



State of Community Management 2011

From Exploration to Execution



Principal sponsors



ROSETTA

The **Community Roundtable** is dedicated to the success of community, social media, and social business practitioners. We facilitate TheCR Network – a community of peers that provides access to experts, programs, curated content, relevant connections, and a private environment to share experiences.

For more information, please visit us at community-roundtable.com



Sponsors



Acquia

Acquia helps organizations of all sizes build social community websites quickly, easily, and with a lower total cost of ownership by leveraging Drupal, the open-source social publishing platform that blends content and community. Acquia's Drupal Commons is a ready-to-use solution for building flexible, fully-featured community websites quickly. With familiar features like blogs, wikis, friends, and discussions all organized around groups and topics, organizations can quickly and easily create branded communities to help grow awareness, gain mindshare, and increase sales.

With a full suite of support and services from Acquia, you can choose the level of support you need; anything from technical answers for your internal staff to outsourcing your entire project with Acquia's fully managed service. Our products, services, and support enable companies to leverage the power, technical innovation and economic value of Drupal while simplifying the experience, removing the complexity and minimizing the risk.

For more information please visit: acquia.com/drupalcommons



Enterprise 2.0 Conference

Social business technologies accelerate information flow to drive revenue and productivity. Attend Enterprise 2.0 Conference to learn how to leverage social business, focused on how real customers use the latest technologies in a comprehensive conference. Visit leading companies showcasing the latest collaboration tools and services in the expo pavilion. Bring the power of Enterprise 2.0 to your organization.

Register Today with Code **Report** and Save \$100 Off Conference Passes or for a Free Expo Pass.

For more information please visit www.e2conf.com



Farland Group

Farland Group is a marketing services consulting firm with expertise in building customer community strategies and programs. Our deep experience in business-to-business and consumer brand environments, creates opportunities for businesses to engage their customers in new market development, product innovation and service differentiation. Headquartered in Cambridge, Massachusetts, Farland Group brings together expert marketers, writers, consultants and sales professionals to help technology, health and science, financial services and consulting companies create long-term customer engagement and relationship extension programs.

Form more information please visit www.farlandgroup.com



Igloo Software

IGLOO is helping intranets and extranets stage a comeback. Forget what was once wrong, this time it fits in your budget, runs in the cloud and it's powered by enterprise social technologies.

With IGLOO's social intranets and extranets, it is easier to collaborate around files, locate expertise and work together in a networked organization. And because it's deployed in the cloud, users are up and running quickly without the burden on IT. That is why both up and coming businesses and world-class brands, such as NetApp, AstraZeneca, ATP Tour, Thomson Reuters Aranzadi and Deloitte, are choosing IGLOO.

For more information please visit www.igloosoftware.com



Moxie Software

Moxie Software is an innovative software company that provides an integrated social enterprise software for employee and customer engagement through its Spaces™ by Moxie platform. This integrated solution, also includes Moxie Knowledge Spaces™, enabling customers and employees to co-create and share knowledge.

The company also owns a thought leadership division – Moxie Insight that provides over the horizon research and thought leadership in enterprise technology, talent development and collaborative innovation.

Hundreds of the world's most respected and innovative companies leverage Moxie Software solutions to increase collaboration, accelerate innovation and improve customer experience.

For more information please visit www.moxiesoft.com

ROSETTA

Rosetta

Rosetta is the largest independent interactive agency in the US and is ranked by Ad Age among the top ten overall. Rosetta was recently named the #1 Agency to Watch in Ad Age's Agency A-List. Engineered for the connected world, Rosetta was founded in 1998 to pilot brands through an ever-changing marketing landscape and drive measurable business impact. Rosetta enables brands to transform their marketing through the discovery of unique insights about their best consumers' wants and needs and then translates those insights into more personally relevant experiences enabled by technology across all touch points and over time. Rosetta recently acquired LEVEL Studios, a leader in combining content, platforms and devices to create engaging total user experiences. Rosetta has deep industry expertise in Healthcare, Consumer Products & Retail, Financial Services, Consumer Technology, B2B and Travel & Hospitality.

For more information please visit www.rosetta.com



Social Media Today

Social Media Today, LLC, launched in the Fall of 2007, is an independent online editorial community for professionals in PR, marketing, advertising, or any other discipline where a thorough understanding of social media is mission critical. Every day, we provide insight and host lively debate about the tools, platforms, companies and personalities that are revolutionizing the way we consume information across our family of 10 purpose-built B2B niche communities (including The Social Customer). All of our content is contributed by our members and curated by our editorial staff.

The Social Customer, launched in November 2009, is an editorially independent, moderated community for leading customer service practitioners and thought leaders. We provide unique content and resources for all who work in or follow the customer experience as it evolves beyond call centers and increasingly permeates business organizations. Numerous studies show that the cost of obtaining a new customer is 7-10 times greater than that of retaining existing customers, further underscoring the importance of customer service in a digital world. By shedding fresh light on issues such as community management, call centers, CRM, social media best practices and customer loyalty, we aim to show how organizations can become smarter and more customer-friendly in the 21st century.

For more information please visit www.socialmediatoday.com and www.thesocialcustomer.com

Supporting Sponsor



We are [Human 1.0](#) and you are too – so let us guide you through the fundamental shifts impacting your business today. With us, you will understand the people aspect of the social, the Human 1.0, which took tens of thousands of years to develop, rather than the Web 2.0 tools. After all, it's more about the people than the tools. Together we'll harness the power of this social messiness (Social Media, Communities, and Web 2.0), by helping you to think and act differently. Success means thinking tribes and knowledge networks instead of market segments; becoming human-centric, and ditching product-centricity; and turning your business processes into social processes. So embrace the social messiness with Human 1.0 as your guide and let people be part of the solution.

If you need the corporate speak, Human 1.0 is a business innovation firm helping clients understand, adopt and execute social strategies. More simply put, we're all about the human-to-human experience in this new and evolving digital world. For more information, please visit www.human1.com



Introduction

Welcome to **The State of Community Management**, an important compilation of lessons learned from people actually practicing community management at both large and small companies.

Community management is nothing new—it exists in the offline world through community organizing and in the digital realm, the act of “managing” communities has existed ever since the earliest incarnations of message boards and even chat rooms. So why is it getting so much attention right now? For one, social platforms such as Facebook, Twitter, blogging and a host of others are taking digital community dynamics, which have existed in the background and niches, and bringing them into the mainstream. It’s not unusual for your average Internet user to have access to a minimum of one or two networks, whether it’s Facebook, LinkedIn, Twitter or something else.

The way we use search engines also increases our exposure to networks and thus community behavior. It’s becoming a more common scenario to initiate a search and end up at a destination, which demonstrates participatory behaviors—for example, an article with a lively discussion thread or a well-trafficked question and answer page on a network such as Quora. Many of these experiences offer “community light” to some degree, but they also underscore a fundamental shift, posing a significant challenge to many organizations large and small.

Community dynamics are often organic and difficult to automate and as many organizations are learning, managing a community is not the same thing as moderating what a community says (filtering what’s appropriate and inappropriate). The two are related, but moderation exists as a subset of community management and community management lives within the general construct of connectedness. It takes having skin in the game to effectively manage communities and this presents many organizations with the challenge of establishing economies of scale. Human beings have never been easy to scale.

However, healthy communities do indeed scale. They do so because it is not only the community managers who help them grow, but also because the members of vibrant communities evolve into citizens that contribute meaningfully to society. And this may fundamentally become the long-term goal for community management as it continues to evolve and grow with the proliferation of social platforms and emerging digital behaviors. If we begin to view communities as “micro societies” and members as citizens, then the role of the community manager becomes something more akin to an ambassador, connecting multiple digital cultures across a fragmented landscape. Connectedness, after all (not technology) is at the heart of community.

David Armano

SVP, Social Business Planning & Integration

[Edelman](#)



TheCR Network Industry Perspective

I've been thinking a lot about the concept of **uploading humanism** in technology. There is no better evidence of that being needed than in online community management. Because the zen of community is the values and concerns of the individuals who choose to be part of it, and success depends very much on bringing them to the fore in a way that transforms members into customers.

Community managers need to be experienced at reading digital body language, in good and potentially bad situations, as we talked about in our conversation at The Community Roundtable call recently. So thinking and communicating clearly is a key asset, along with the ability to know what to listen for to understand the nuances of our human operating system.

Balanced humanism works as active agent to increase the options, choices, and possibilities of others. Which in turn inspires altruistic gestures and reactions and creates an environment where individuals start to identify themselves as part of a cohesive group.

The game changing community activity may not be very sexy -- small nudges here and there, making a comment at the right time, being patient and kind even when you'd like to scream because you're having a bad day, and making sure you cover that last mile to making a connection. Regardless of the specific goals, when the ultimate goal and spirit of community management is making life better for all -- customers, employees, prospects, and yes, even detractors -- alike in different ways, you win.

Valeria Maltoni

Principal, Conversation Agent LLC

Author: ConversationAgent.com

TheCR Network Member Perspectives



We came across The Community Roundtable early in 2010 when we were starting to develop a strategy for social media and community management within our company. We weren't having much luck in finding actionable frameworks or methodologies until we came across the Community Maturity Model developed by TheCR. It didn't take us long to become members of the network after conducting a daylong workshop with Jim and Rachel. Their knowledge and experience in this space coupled with the peer network that they have assembled are invaluable resources to my team as we tackle a variety of topics related to social media. Needless to say, this environment is very dynamic so it's an enormous help to have access to a network of resources and online assets.

Dan Brostek

Head of Consumer and Member Engagement
Aetna



When it came time for 2011 budgets, my team's memberships to The Community Roundtable were considered "untouchable". The digital information alone (The State of Community Report, blog posts, and discussions) is worth far more than the price of membership. But the most valuable gift TheCR provides is Rachel and Jim's ability to connect people. My professional and personal networks have exploded since joining The Community Roundtable. It's hard to express the value you gain through great relationships, but it is so clearly evident when you invest in Rachel, Jim and the members of TheCR.

Michael Pace

Director of Customer Support & Community Management
Constant Contact



The Community Roundtable has been a truly valuable group for me over the past several years because its members are peers facing the same challenges that I do. The members are open and willing to share what has worked for them, and what hasn't and there is tremendous value in being able to ask a question and gain honest feedback and insight into what other organizations have done before I launch into my own initiative or campaign.

You also can't top the list of experts both within the member base itself, as well as the industry experts that Rachel and Jim provide members direct access to in the regularly scheduled member calls. Having access to such a network of experts truly affords me the opportunity to discuss, share and try new things to see what works for my particular situation. It doesn't get any better than that!

Jamie Pappas

Previously, Manager, Enterprise Social Media Engagement Strategy
EMC Corporation



The Community Roundtable is the best resource for community managers out there. Since the field is so new, hearing from other CMs is hands down the most useful way to pick up tips and advice. The Roundtable is the only place that offers that kind of direct communication through its online network and collaborative conference calls. It's easy to use and the folks here are so friendly, willing to jump in on any topic or situation no matter how unique it may be to a CM's organization. The talented people who run it are always open to ideas and often bring in outside professionals to speak on different subjects, giving me information that I normally don't have access to...or the time to dig up. The Roundtable is a highly engaged community, we have a lot of fun here and the success it has is proof positive of the success it helps its members to achieve in the communities we run.

Megan Smith

Community Manager
Ovation

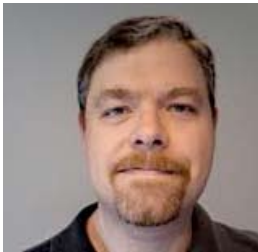


Now that community management is becoming commonplace at more and more companies, I keep meeting people tasked with handling community management who have no idea where to turn for guidance. Almost every time one asks me a question, I find my answers starting with “we did a call about that on The Community Roundtable...” or “someone asked that on The Community Roundtable discussion board....” For anyone tasked with community management, I can’t recommend The Community Roundtable highly enough – it’s such an incredible source of information and networking.

Maggie McGary

Community Manager

American Speech Language Hearing Association (ASHA)



The Community Roundtable provides a great resource for social strategists and community managers. Not only do they program excellent sessions with top practitioners, the interactions with peers provide some great insight into how others think about, or have dealt with, the same issues that I encounter in my own role. Jim and Rachel do a great job of fostering this ongoing conversation.

David Meiselman

Director of Digital Web Strategy

The Hanover Insurance Group



The Community Roundtable founders exemplify the principals the community espouses. New members are welcomed and guided to interesting information, social interactions among the members are encouraged, lurkers are lured into the discussions, and exhilarating content and quality presenters are offered at regular intervals. The CR members share tactics and best practices while the community managers/founders reinforce a strong theoretical underpinning and framework for strategic community planning. In short, The Community Roundtable is an essential resource for community managers at all levels of experience regardless of the entity they manage.

Leigh Mutert

Community Manager

H&R Block

Table of Contents

16	About The Community Roundtable
17	About this Report
17	Methodology
18	Community Maturity Model
20	2010 Roundtable Schedule & Topics
	<i>January</i>
	<i>February</i>
	<i>March</i>
	<i>April</i>
	<i>May</i>
	<i>June</i>
	<i>July</i>
	<i>August</i>
	<i>September</i>
	<i>October</i>
	<i>November</i>
	<i>December</i>
23	Overview
23	Social Business Becomes A Strategic Imperative
24	Interest in Community Management has Increased
26	The Community Management Discipline is Evolving
27	A Lot of Confusion Remains
29	Survey Results: Market Maturity
29	Survey Description
29	Methodology
30	Survey Demographics
	<i>Organization Size</i>
	<i>Business Context/Market Type</i>
31	Results
	<i>Strategy</i>
	<i>Leadership</i>
	<i>Culture</i>
	<i>Community Management</i>
	<i>Content & Programming</i>
	<i>Policies & Governance</i>
	<i>Tools</i>
	<i>Metrics & Measurement</i>

- 34 **Survey Analysis**
 - Adoption is Entering the Mainstream*
 - Culture Is a Lagging Challenge*
 - Medium Sized Organizations See Market Opportunity*
 - Community Management Matters*

- 36 **2011 Lessons Learned from TheCR Network Members**
- 36 **Strategy**
 - Understand Your Audience*
 - Understand the Value Exchange*
 - Build the Right Community*
 - Be Realistic*
- 41 **Leadership**
 - New Leadership Perspectives*
 - Networked Market Understanding*
 - Leadership Tactics that Drive Change*
- 47 **Culture**
 - Training, Incentives & Encouragement*
 - Share Successes*
 - Evangelize*
 - Support Community Leaders*
- 54 **Community Management**
 - Promoting Engagement & Productivity*
 - Manage Boundaries*
 - Understand Human Behavior & Dynamics*
 - Workflow and Communications Tactics*
 - Promote Community Leadership*
 - Evangelism and Internal Culture Change*
 - Managing the Role of Community Manager*
 - Skills, Experience, & Attributes of Community Managers*
- 66 **Content & Programming**
 - Content Strategy*
 - Content Planning*
 - Content Development*
 - Content Publishing*
- 75 **Policies and Governance**
 - Guidelines & Policies*
 - Governance*
 - Regulation*
- 79 **Tools**
 - Social Media*
 - Platform Changes*

	<i>Optimizing the User Experience (UX) for Engagement</i>
	<i>Internal Collaboration</i>
	<i>Vendor Evaluation</i>
86	Metrics and Measurement
	<i>Different Audiences, Different Metrics</i>
	<i>Measurement Techniques</i>
	<i>The Catch 22 of Community ROI</i>
90	Summary
91	Appendix: Resources
91	Strategy
	<i>Experts</i>
	<i>Further Reading & Resources</i>
91	Leadership
	<i>Experts</i>
	<i>Further Reading & Resources</i>
92	Culture
	<i>Experts</i>
	<i>Further Reading & Resources</i>
92	Community Management
	<i>Experts</i>
	<i>Further Reading & Resources</i>
	<i>Conferences & Events</i>
93	Content & Programming
	<i>Experts</i>
	<i>Further Reading & Resources</i>
93	Policies & Governance
	<i>Experts</i>
	<i>Further Reading & Resources</i>
94	Tools
	<i>Experts</i>
	<i>Further Reading & Resources</i>
95	Metrics & Measurement
	<i>Experts</i>
	<i>Further Reading & Resources</i>

About The Community Roundtable

The Community Roundtable is an organization dedicated to the success of community, social media, and social business practitioners and along with report and advisory services operates TheCR Network, a peer network for professionals in the space to learn from each other and get introduced to best practices, experts, and tools.

Members are leading the discipline of community management at organizations big and small – from Fortune 500 like SAP, EMC, Aetna, Cisco, Verizon Wireless, HP and Unilever to smaller organizations like OvationTV, EDR, American Speech Language Hearing Association, IDC, CFA Institute, GHY International, Constant Contact, & MocoSpace. Members are typically business leaders of a social initiative or community managers.

[Learn more](#) about being a member of TheCR Network.

About this Report

We publish an annual State of Community Management report that compiles the lessons we learned with members from the previous year. This report extends and adds to our [2010 State of Community Management: From Recognition to Exploration](#).

This report is not intended to offer a comprehensive overview of community management but instead represents the scope of the discussion held by TheCR Network in 2010. For a more structured perspective on the community management discipline, please see our presentation [Community Management Fundamentals](#).

The perspectives provided in this report represent those of various experts and practitioners and may not necessarily be the best practice for every context. Community management is a discipline that requires judgment and a deep understanding of the dynamics of a specific community so what we offer here are a variety of perspectives.

Methodology

This report is a compilation of everything The Community Roundtable learned during conversations with members during 2010. We hold over 40 member calls throughout the year with experts from a variety of disciplines that are pertinent to understand for social media, community, and social business practitioners. These conversations are recorded, transcribed, and published to TheCR Network.

This report includes both a compilation of lessons from our weekly call summaries as well as analysis and survey findings, organized by the competencies outlined in our Community Maturity Model.

We hope it gives you a valuable reference tool in your own social business initiatives and [we hope you will consider joining TheCR Network](#).

Community Maturity Model

We developed the Community Maturity Model as a way of organizing and making sense of the issues, associated competencies, and information relevant to community management expertise. It aligns on two axes: competencies and maturity levels.

	Stage 1 Hierarchy	Stage 2 Emergent Community	Stage 3 Community	Stage 4 Network
Strategy	Familiarize & Listen	Participate	Build	Integrate
Leadership	Command & Control	Consensus	Collaborative	Distributed
Culture	Reactive	Contributive	Emergent	Activist
Community Management	None	Informal	Defined roles & processes	Integrated roles & processes
Content & Programming	Formal & Structured	Some user generated content	Community created content	Integrated formal & user generated
Policies & Governance	No Guidelines	Restrictive	Flexible	Inclusive
Tools	Consumer tools used by individuals	Consumer & self-service tools	Mix of consumer & enterprise tools	'Social' functionality is integrated throughout
Metrics & Measurement	Anecdotal	Activity Tracking	Activities & Content	Behaviors & Outcomes

The eight competencies in the Community Maturity Model are those that must be addressed in order to build either a successful community or a social business competency across an enterprise. They are:

- Strategy
- Culture
- Leadership
- Community Management
- Content & Programming
- Policies & Governance
- Metrics & Measurement
- Tools

Along with the competencies, we have identified four stages of maturity:

- **Stage 1: Hierarchy** – no use of social technology or community structures.
- **Stage 2: Emergent Community** – ad hoc, experimental, or pilot use of social and community tools and/or processes.
- **Stage 3: Community** – explicitly chartered, funded, and staffed social or community initiatives resulting in measurable business outcomes.
- **Stage 4: Network** – a corporate strategy driven by a networked market perspective.

These stages refer primarily to the information and relationship environment of an organization. In a Hierarchy, information is shared one-to-one or one-to-many. In an organization with Emergent Community, pockets of individuals are starting to experiment with many-to-many communications. In a Community, there are successful many-to-many communications environments existing for a variety of different constituent groups. In the Network stage, an organization views its markets as a set of relationships, and is linked to the majority of market participants regardless of whether they do or do not directly impact revenue – because they all have a capacity to influence customers.

While these maturity stages are a continuum, certain behaviors are emerging as established best practices for particular stages. For example, Emergent Community suggests that there is some usage and experimentation of social tools and techniques is happening – whether formally or informally. Defined budgets, community management resources, and policies are hallmarks of an established Community. Finally, having a Network suggests integration between employee, customer, partner, and even competitor constituencies – and that the company focuses on the strength of these relationships as the foundation of its corporate strategy.

These segments inform the way we organize community management content. The Community Maturity Model can be used as:

- A framework to set expectations for both community managers and stakeholders across an organization
- A tool to execute an enterprise performance gap analysis
- A model of community management's cross-functional nature
- A taxonomy for organizing best practices, examples, templates, and tools
- A roadmap for organizational planning

This report addresses the competencies in the Community Maturity Model as our members practice them. While this may not always align with the most current discussions about each competency, we feel it represents the leading methods employed by practitioners today.

2010 Roundtable Schedule & Topics

Topic-specific, facilitated roundtable calls are the core of TheCR Network's programming. These calls often include an independent expert that joins the discussion to share their best practices and facilitate a member discussion. For members, we publish roundtable reports summarizing the discussion and highlighting the best practices, advice, and lessons learned. Below are the roundtable calls that were held in 2010 and are used as source material for this report, with the featured expert and core community management competency listed.

January

- **Getting Started with Podcasting** | Led by [John Wall](#) – content & programming
- **Hiring for Your Community** | Led by CR members – community management
- **Using Social Media for Customer Support** | Led by [Frank Eliason](#) – tools/customer support
- **The Culture of Community Engagement: An Anthropological Discussion on How to Encourage More Member Interaction** | Led by [Chris Bailey](#) – culture

February

- **Creating Social Content** | Led by [Natanya Anderson](#) – content & programming
- **Internal Evangelizing: Challenges & Lessons Learned** | Led by TheCR members – strategy
- **Enterprise Perspectives: Social CRM** | Led by [Mary Wardley](#) – tools
- **Privacy, Free Speech, and 'Blurry-Edged' Social Networks** | Led by [Lauren Gelman](#) – policy & governance

March

- **Work/Life Balance and The Community Manager** | Led by [Leanne Chase](#) – community management
- **UX Choices: Designing Your Community for What You Want** | Led by [Margot Bloomstein](#) – strategy
- **Using Humor in Your Community** | Led by TheCR Members – culture
- **Creating a Content Ecosystem** | [Leslie Poston](#) – content & programming
- **Disputes, Flame Wars and Trolls: Managing Conflict in Community** | [Andrea Weckerle](#) – community management

April

- **Asking The Right Question & Other Blogging Best Practices** | [Liz Strauss](#) – content/programming
- **Visual Communications & Storytelling** | [Nancy White](#) – content/programming
- **The BIG Switch: Migrating Your Community from One Platform to Another** | Led by TheCR Members – tools
- **The Story of Movember: From Local Community to Global Phenomenon** | [Adam Garone](#) – community management

May

- **Developing a Community Management Mindset** | [David Alston](#) – strategy
- **Using Social Media in Consumer Electronics** | [Dave Delaney](#) – community management
- **A Short History of Community Organizing** | [Debra Askanase](#) – leadership

June

- **Member Case Study: GHY International Goes ‘Social’** | [Nigel Fortlage](#) – strategy
- **Integrating Social Media into Conferences & Events** | [Chip Rodgers](#) – content & programming
- **Social Content Strategies** | member led call – content & programs
- **Facebook Update: Community Pages and the ‘Like’ Button** | [Cappy Popp](#) – tools

July

- **Simplifying the User Experience to Increase Engagement at Salesforce** | [Erica Kuhl](#) – tools
- **TheCR Summer Book Club Discussion: Open Leadership by Charlene Li** | leadership
- **FAWM.org: Lessons Learned in Building a Creative Community** | [Burr Settles](#) – community management

August

- **Open or Closed? What Kind of Community is Right for You** | [Julie Wittes Schlack](#) & [Aaron Strout](#) – strategy
- **TheCR Summer Book Club Discussion: The Power of Pull with** [John Hagel](#) | strategy

September

- **Community Platform Market Overview** | [Tony Byrne](#) – tools
- **Using Social Media in a Regulated Industry** | [Mari-Anne Snow](#) & Ed McNicholas – Policies & Governance
- **Evolving Customer Support at Constant Contact** | [Michael Pace](#) – strategy, customer support
- **Change Happens: Strategies for Dealing with Organizational Change** | [Kevin Ryan](#) – culture

October

- **Integrating 3rd Party Social Networks into your Community Strategy, SAP Case Study** | [Gail Moody-Byrd](#) – tools
- **Supercharging Your Social Content Engine** | [Andrew Davis](#) – content & programs
- **Community Engagement: Turning Customers into Fans, Yahoo Case Study** | [Robyn Tippins](#) – community management
- **Jumpstarting Social: Lessons from a Large Organization** | TheCR Member led – strategy

November

- **Selling Social Media & Community to the C-Suite** | [Jaime Punishill](#) – leadership
- **The ROI Conundrum: Communicating the Value of Relationship** | TheCR Member led – metrics & measurement

December

- **Social Learning and the Changing Enterprise Landscape** | [Marcia Conner](#) – strategy
- **Digital Embassies: A Blueprint For Community Engagement** | [David Armano](#) – community management
- **Emerging Challenges for Community Managers** | Member led – strategy

Overview

Social Business Becomes A Strategic Imperative

In the past year, not only has organizational use of social technologies come of age but the market has found a term that better expresses the scope and intentions behind the use of social technologies – social business. Social business is the result of making organizations more humane, adaptive, and resilient in order to increase revenue through relevance and reduce costs through crowdsourcing. Communities sit at the heart of these efforts.

The maturity of social business is marked in part by a McKinsey study, [The Rise of the Networked Enterprise: Web 2.0 Finds Its Payday](#), showing that companies are seeing significant benefits from using Web 2.0 tools, particularly those that have achieved what McKinsey calls a ‘fully networked enterprise’, using networks both internally and externally to achieve performance gains.

But what IS social business? Even the [experts don't agree](#) but if social business is the goal, we believe the strategy and tactics break out in the following way:

Strategy: To make organizations more humane, adaptive, and resilient in order to increase revenue through relevance and reduce costs through crowdsourcing.

This strategy is then implemented through a variety of tactics:

Process: ‘Socializing’ a process means that it becomes interactive and iterative, with many constituent groups contributing throughout the process, and more dependent on collective actions to succeed.

Management: Community management is the discipline of ensuring that communities are productive. In this context, communities are collections of individuals who are bound by needs or interests rather than authority or hierarchy, which is why a new approach to management is needed.

Technology: Social Media, SCRM, Enterprise 2.0/enterprise social platforms, co-innovation tools or any of a host of emerging social technologies aimed at specific business processes.

These tactics then are applied to a specific business operations context – i.e. to outbound marketing, sales, collaboration, recruiting, professional development, or market research – to achieve the desired results.

One of the major changes we've seen in 2010 is an increased recognition that tools and having a 'presence' is not enough. Using social technologies successfully requires both business process adaptation and people that understand how to manage these new social environments – at both a tactical and a strategic level. The conversation is no longer primarily about technology but about doing business effectively in a new communications environment. We believe the community management discipline is a key element of managing networked environments effectively.

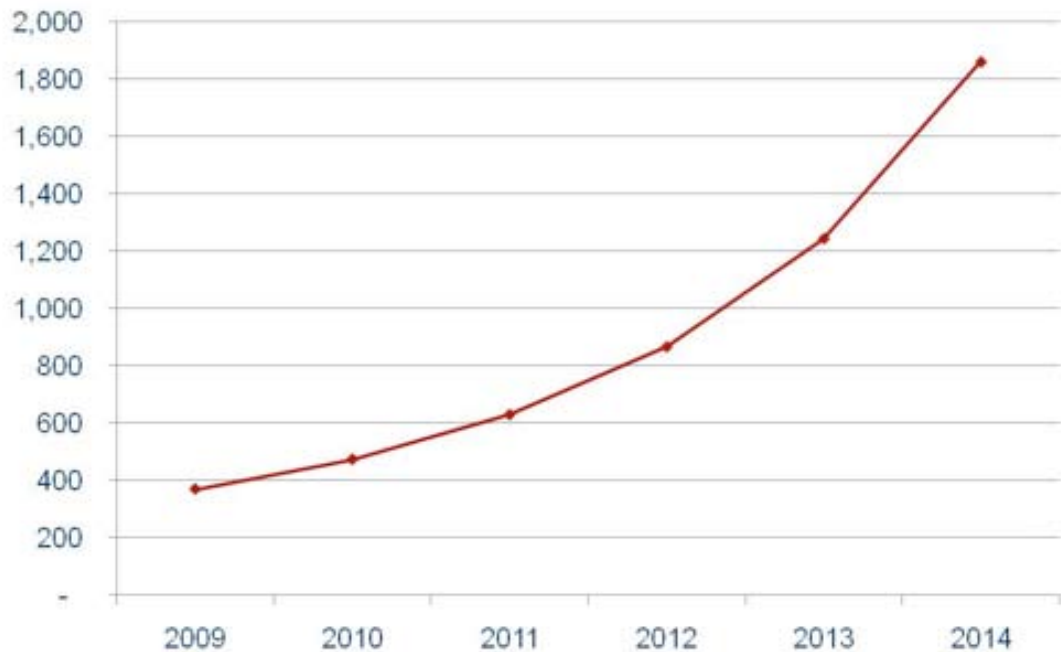
Interest in Community Management has Increased

The concept of community management has become a hot topic in the last year – driven by the more mainstream interest in social business as well as a collection of companies like Radian6, Jive Software, IBM, eModeration, Acquia, The Community Roundtable and many others pushing to drive more awareness about the discipline and the need for it.

We think that this is partially due to what [Thomas Wander Val](#) calls the One Year Club in which organizations implement software but then find that after a year, not only is the software not what they need to mature past the first year, they are also missing the process and management changes required to make their initiatives successful.

We have seen the adoption of enterprise social software grow at an incredible clip, driven largely by the adoption of consumer social technologies by individuals. IDC's forecast shows enterprise social software adoption growing from \$370M in 2009 to almost \$2B by 2014 – a 38% compound annual growth rate (next page):

IDC's Worldwide Social Platforms 2009-2014 Forecast (\$M)



© IDC Visit us at IDC.com and follow us on Twitter: @IDC

Feb-11 | 1

This technology adoption has often happened in pockets or in isolation of process change and as organizations progress they are finding that using the technology successfully requires a new mode of management as well as changes to the way they do business. This is a common and expected change as the market matures. However, social technologies change communication dynamics in a fundamental way and radically change the approach to managing the individuals that participate. Society has had one-to-one and one-to-many communication technologies for a long time – the phone, radio, TV, web conferencing, etc. but social software creates a many-to-many communication environment that combined with cloud-based platforms create a new dynamic that requires a fundamental shift in how we manage the individuals that participate:

- Speed of information transfer between people has increased dramatically
- The informality of information shared has increased dramatically now that communication channels (and with it editing) are not required.
- Information once shared cannot be easily deleted.

The power to share information with large groups has been distributed to all individuals, creating a huge shift in how organizations communicate and long term, how they are structured for optimal effectiveness.

This new communications environment creates both large risks and large opportunities because of how fast information spreads and because of the difficulty in directing or enforcing how individuals – particularly those without other vested interests in your organization – communicate. Community management is an approach that assumes influence but not control while managing risk and promoting productive behaviors. For organizations to gain competitive advantage in this new environment they will have to excel at community management and many organizations now understand this.

The Community Management Discipline is Evolving

If you ask 10 different people in the social media/online community market to define what a ‘community manager’ does, you will likely get 6 different definitions. Community management is evolving and changing as more organizations understand how to use networked structures to execute efficiently on business goals. This is healthy and productive but also adds to the confusion. Individuals that primarily manage an organization’s Facebook and Twitter channels as part of PR and general communications think of themselves as community managers. Individuals who only work inside an online gaming environment think of themselves as community managers. Individuals that manage customer support forums think of themselves as community managers. Knowledge managers who run communities of practice inside of organizations think of themselves as community managers. Increasingly, various types of executives who execute their responsibilities primarily through a community approach think of themselves as community managers. They are all right but their responsibilities may not be that similar although all should share some fundamental understanding about how communities operate effectively.

At its most transactional, community management is about moderating terms of service violations. At its most strategic, community management is about changing the how costs and values are accrued by your organization and delivered to the market and in so doing, changing the business model.

As the community management discipline has grown and become more faceted, it is increasingly necessary to understand how the discipline can best be applied to a specific organization. The best emerging leadership in community management are individuals who understand the following:

1. Human behavior and motivations
2. The community management discipline
3. Business
4. Their organization

These individuals tend to be senior managers, directors, or VP level professionals – individuals with enough experience that they have a firm understanding of their organization’s culture, priorities, and limitations; the relationships internally to make change happen; experience managing people; and a solid understanding of social tools and methodologies. As social business initiatives grow, these leaders head up teams of community managers – some focused on relationships, some on content or programming, some on analytics and measurement, some on technology, and others on strategy or innovation. Few people may actually hold the title ‘community manager’ yet more people need to understand the discipline.

A Lot of Confusion Remains

As with any new market, there is a lot of confusion and jockeying for position and ownership. The term ‘social business’ seems to be getting the most traction but with that, marketers at a wide swath of vendors are touting their social business expertise when, in reality, the term means different things to different people. For practitioners it is worth the following considerations when trying to make sense of it all:

- Do research and dig a bit deeper – it will give you better insight and if it doesn’t, that tells you something too
- Evaluating the relationships a vendor has with customers and partners will give you a great sense of who considers them valuable and reliable
- Do they understand social marketing? i.e. do they provide enough information to you freely so that you can evaluate their relevance for you?
- How openly do they handle customer support?

- How well do you get on? If you can't relate it is likely that issues will be tough to resolve satisfactorily when they arise
- Determine whether their scale matches your needs – are they too big to pay attention to you or too small to handle your demands?

There is a lot of both legitimate and unfounded excitement and hype in this space but too much hype can trigger negative reactions with skeptical internal stakeholders so think strategically about which external experts are presented to internal audiences. It pays to be methodical and measured – there is, indeed, a lot of opportunity but it does not come with out significant challenges and risks. Understanding how to balance the opportunities and risks with your internal environment and external market is the path to effective use of social tools and methodologies.

Survey Results: Market Maturity

Survey Description

This survey was designed to understand the current state of market maturity across the competencies in the Community Maturity Model, using artifacts that we defined with input from members of TheCR Network.

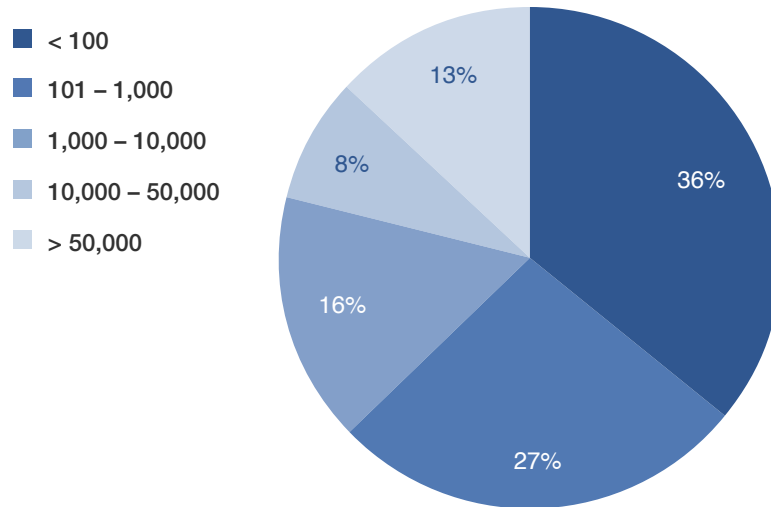
Methodology

The Community Roundtable surveyed 109 individuals in November and December of 2010, solicited to participate through our mailing list, our social media outposts, and through TheCR Network.

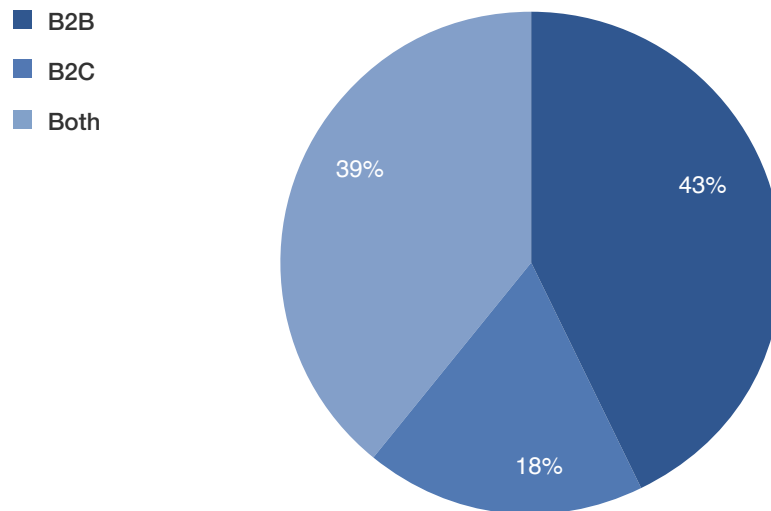
Survey respondents were not a blind panel of executives and instead represent individuals involved with social initiatives at their respective organizations. Because of that, the results are biased toward companies that already participate on social channels in some way. The results are also likely to accurately reflect the state of organizational maturity because respondents are in a position to know. However, the survey did ask participants to respond using their personal perspective, rather than with 'official' answer by their organizations.

Survey Demographics

Organization Size



Business Context/Market Type

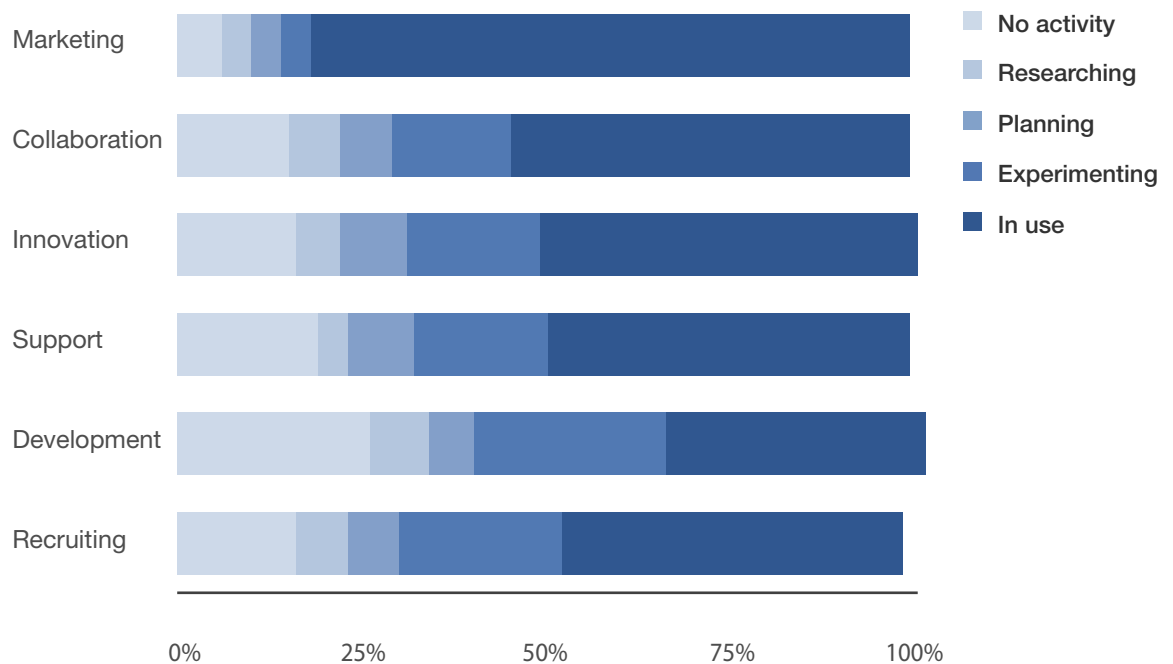


Results

Strategy

The majority of respondents are now using social approaches across a wide variety of functional goals and while social approaches are most used for marketing, a majority are also applying social to support, innovation, and collaboration.

Functional use of social approaches



Leadership

Perception of executive attitudes toward social business is overwhelmingly positive with 31% of executive's views as 'enthusiastic' about social approaches:

Resistant	3%
Skeptical	7%
Neutral	10%
Interested	19%
Cautiously Optimistic	28%
Enthusiastic	31%

Culture

While executive enthusiasm is relatively high, the culture of information sharing is decidedly mixed with 19% of respondents viewing their organizational culture as either controlling or downright paranoid.

Paranoid	4%
Controlling	15%
Resistant to sharing	9%
Opportunistically collaborative	19%
Team-based	25%
Committee/consensus driven	6%
Open	21%

Community Management

We were pleasantly surprised to hear from 67% of respondents that their organizations had community managers.

Content & Programming

User generated content is a key element of reducing costs through crowdsourcing but it requires an organization to give up some control which can be tough to do. We asked how comfortable organizations were with using content that was not 'official'.

While a quarter of all companies are not comfortable with using unofficial content, most are willing, somewhat or very comfortable doing so.

Not comfortable	25%
Only if we don't have the bandwidth to do it ourselves	13%
Somewhat comfortable	48%
Very comfortable	13%

Policies & Governance

The majority of organizations have explicit social media policies for employees – 63% and another 15% are in the process of developing them. 22% of organizations still do not have policies or the respondents were unaware if they did.

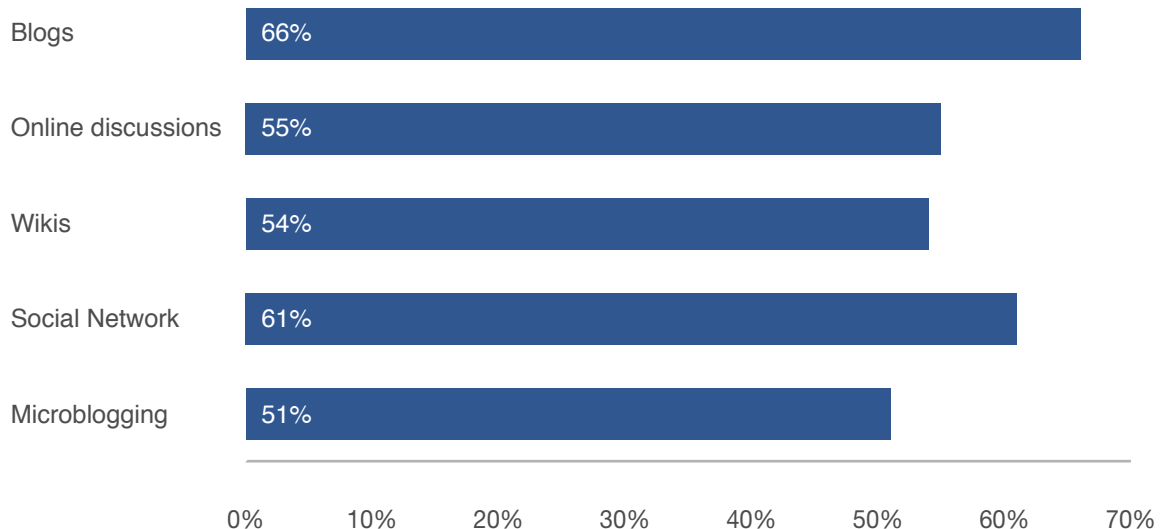
9% of companies restrict access to all social media sites and another 18% restrict access to some but not all sites. 73% of respondents however, responded that their organizations do not restrict access to any sites.

The governance of social initiatives is handled predominantly in two ways – either independently by functional groups (42%) or managed by functional groups but coordinated centrally (40%). 6% of organizations are managing initiatives through experimental or labs groups and 11% manage initiatives in some other way.

Interestingly, 48% of organizations with community managers have a central team to coordinate initiatives across functional groups. Only 22% of organizations that do not have community managers govern their social initiatives through an enterprise-wide team.

Tools

A wide variety of social technologies are available in people’s work environment, with blogs and social networks being the most available. Surprisingly microblogging is available to 51% of the survey population, perhaps due to the freemium model of vendors like Yammer.



Metrics & Measurement

Given all of the discussion throughout 2010 about ROI and measurement, it is not surprising to find that over half of companies don't have a concrete understanding of what they are getting out of social approaches. While 46% say they do know what they are getting out of their social initiatives, 42% say they only sort of know, and 12% don't know.

Survey Analysis

Adoption is Entering the Mainstream

While our survey is biased towards organizations involved in social channels already, those organizations show broad adoption and increasing maturity. Survey respondents report that their organizations use social business approaches for expected functions like marketing, collaboration, and support but also for processes like recruiting and professional development. A majority of organizations have both policies for employees and community managers, both of which represent a maturing of adoption into stage 3 of the Community Maturity Model.

Culture Is a Lagging Challenge

Not surprisingly, culture is the hardest thing to change because it requires changing the behaviors of enough individuals to reach a tipping point. Overall, 28% of respondents said that their culture was either resistant to sharing, controlling, or paranoid despite the fact that only 10% of executives are resistant or skeptical. For organizations with community managers, that percentage dropped to 14.5%. While we cannot link causality, there is perhaps a chicken and egg phenomenon whereby organizations that prioritize community management have more open cultures and community managers then help encourage cultural openness.

We believe community managers make a big difference in encouraging and supporting cultural change – acting as field guides to this new information terrain for employees, customers, and partners who are either not interested or do not know how to engage or are worried about what they can or cannot do.

Medium Sized Organizations See Market Opportunity

Medium sized organizations are typically the laggards in adoption of new enterprise technologies and processes. They have the complexity of large organizations but not the extra resources making it hard to innovate. Cloud/SaaS-based software and services has made that easier but challenges remain. In most respects our survey confirmed that – for example, they lag their smaller and larger peers in cultural openness and technology adoption. However, medium sized businesses are the biggest adaptors of social approaches in marketing, with 86% of them participating. This is likely because the costs are manageable but these organizations likely have the most to gain since they do not have large brand budgets that make them universally recognized as the result of broadcasted information.

Community Management Matters

While our survey did not investigate the direct causality between hiring community managers and results, those organizations that have community managers are less likely to be culturally resistant (15% vs. 28% without) and more likely to have a hub and spoke model of governance where the enterprise coordinates centrally but operates social initiatives within functional domains (48% vs. 22%). Organizations with community managers are also more likely – across the board – to use social approaches to various business processes and more likely to have deployed social technologies. None of this is particularly surprising but it is good validation.

One area in which community managers have work to do is in the area of measurement and communication of outcomes. While fewer organizations with community management had no idea what they were getting out of social approaches (7% vs. 17%), the same organizations had only a moderately better definitive understanding of what they did get out of social approaches (48% vs. 44%). Community managers need to be at the forefront of documenting the benefits – both quantitative and qualitative – of using social and community approaches.

2011 Lessons Learned from TheCR Network Members



Strategy

Social strategies have come a long way in the last year. The integration of social tools and methods into existing business goals and processes has become the norm rather than the exception. The majority of companies, who like to see themselves as **'Fast Followers'** because it promises lower risk with higher reward, can no longer sit on the sidelines and watch since not one but many of their competitors are deploying these new communications tools and processes.

We are also seeing companies that deployed social techniques to one business process now doing so with many internal and external processes. Other companies that were slow to start out are now working to catch up with enterprise-wide initiatives rather than smaller functional or pilot projects.

While strategies continue to evolve and address more outcomes, one thing is clear: businesses are taking social strategies seriously – and the budgets are growing. Jeremiah Owyang of Altimeter recently published an excellent report on [how organizations spend their programming budget at various stages of maturity](#).

All community strategies should start with some basics:

- Understanding the target member
- Defined business goals and desired outcomes
- A community construct that produces value for members and the sponsoring organization
- Realistic expectations based on an understanding of community dynamics
- Understanding of the role of technology, change management, and community management to achieving the desired outcome
- Understanding of the organization’s financial, cultural, and talent constraints

Members at The Community Roundtable are in various stages of strategy development and execution, across a range of business processes and the biggest challenge they share is educating internal stakeholders about the dynamics of community structures, what is realistic, and what is required to deploy them effectively. This need has become more pressing as social business initiatives expand across the enterprise and incorporate more business units and functional groups.

Understand Your Audience

- **Understand your members.** It’s basic but worth repeating, know your target member.
- **Build Communities Around Trust.** Trust is a big factor in any type of open community in which you expect people’s contributions.
- **It’s not about you.** When you are thinking about community and creating engagement, unless you are about a lifestyle, a passion or a cause, you do not build your community around your brand.

Key takeaway

It’s basic but worth repeating, know your target member.

- **Foster Belonging.** Building a movement and a community comes back to the fundamental principles of marketing and having a basic value proposition. Mixing an icon, fun, and a sense of belonging at the local level and linking that to a global initiative makes people feel like they belong and are part of something bigger than themselves.
- **Find Green Fields.** Tap into a markets or topics that have not been fatigued by too much attention.

Understand the Value Exchange

- **Demonstrate the Value of Community Membership.** Let members have a test drive before they sign up.
- **Look beyond the obvious.** Just because a constituent group does not participate in a transaction, it does not mean they are not adding value. They may still be helping to drive awareness, contributing content, or facilitating the productivity of the community.
- **Give It a Rest.** Do not communicate if you have nothing important to add and give people breaks, they will come back refreshed
- **Communities create a stickiness,** which often equates to customer retention and can be tracked.
- **Think long term.** Do not discount the total lifetime value of the customer, communities are about long term relationships
- **Let Your Members Promote.** Let the community do its own advertising (also known as “fanvertizing”). Successful communities help people be successful and they will want to share their successes. The advantage of this principle is that people self-qualify and only the right “fit” is attracted to the community

Build the Right Community

- **Nothing grows in a sandbox.** If you want to see growth, you need to build a garden (i.e. seed it with content, interaction, etc.)
- **Protect the fish from the sharks.** In external communities, use a separate venue for marketing and gathering sales leads in order to protect the integrity of the community space.

Key takeaway

Nothing grows in a sandbox. If you want to see growth, you need to build a garden.

- **Don't Replace What Works, Supplement with Community.** Email is still quite effective for many audiences.
- **Integrate Channels.** Part of a thought leadership strategy is to publish a book. It creates presence and credibility in a way blogging or a community will not.
- **Embrace constraints.** Contrary to what many may think, constraints do not restrict creativity, but instead enhance it and creativity drives engagement

Key takeaway

Protect the fish from the sharks.

- **Keep it ripe.** Communities can generate “Ripe” (positive activities) and “Rotten” (trolling, negative types of activities). Keep it ripe by designing the user interface to encourage your desired outcomes and culture.
- **Keep Learning.** If you take a thought leadership position in your market, your thoughts should always be evolving and developing with the market.
- **Understand Desired Participation Rates.** There are many ingredients that go into high participation rates, the most notable being the relative intimacy of the community (the number of people). Understand what you are looking for and build for that.
- **Size Matters.** 300 members is a good baseline size for a private community. This offers enough opportunity to develop new personal relationships without anyone feeling anonymous.
- **Scale Matters.** Marketers are more inclined to start a public community because of the lure of many, many members, which is a huge drawing card for marketing. Furthermore, open communities are more compatible with Facebook, Twitter, LinkedIn, etc.
- **Men & Women Participate Differently.** Women log in more and do less per session and men log in less often and do more per session. Depending on the target member profile, this may affect how you build the community.
- **Social media & community are not the same, but should be linked.** Use social media as an extension of your community. The idea is not to replace anything that happens in the communities, but just extend it.

Key takeaway

Social media & community are not the same, but should be linked. Use social media as an extension of your community.

Be Realistic

- **Communities take time.** Understand your context and audience; many communities take 2-3 years to really get results at scale.
- **Bite Size Wins.** It is imperative that when deploying a social business initiative it is set up to have bite-size wins. Start at the edges, demonstrate real impact against operating metrics and then start to energize and mobilize other people who see the initial team making a difference.
- **Operate at the edges.** The core of any organization or institution is very grooved – it has a lot of vested interest to protect. Consequently, it is remarkably effective at rejecting outside input. Target innovation and bring value to the “edges” of an organization.

Key takeaway

Communities take time. Understand your context and audience; many communities take 2-3 years to really get results at scale.

- **Build guidebooks or playbooks.** Put together a best practice guide to act as a playbook for extended team members. It helps them to think of their tasks more strategically and thoroughly as well as bringing them up to speed faster.



Leadership

Social business initiatives can be challenging for executives at large organizations: in some cases they feel they're being forced to engage (i.e. their customers are pressing the issue), while in other cases, they are interested in the social business opportunity but the broad organizational impact can introduce a complex set of obstacles.

However, leaders and executives are starting to see the benefits of flattening the communications hierarchy between themselves and their employees, customers, and the public. Social initiatives enable them to rapidly scale their communications, build stronger relationships with established and potential customers, and promote their overall vision and thought leadership more quickly and to a wider audience.

Our survey results showed that leaders have a more positive view of social business than we're seeing in the general culture of their organizations. This trend has been set in large part by thought leadership from [John Hagel](#), [Gary Hamel](#), [Charlene Li](#), [Umair Haque](#), [Rosabeth Moss Kanter](#), [Francois Gossieaux](#), and the [McKinsey Quarterly](#) among others. We believe this is why social business initiatives are getting more strategic attention and funding.

New Leadership Perspectives

- **Community management isn't just a role – it's a perspective.** Community management is emerging as a philosophy and way of thinking about a functional discipline, rather than simply a role to be filled. A community-minded leader values transparency, engages with various constituencies, solicits feedback, promotes inclusion, and supports and shares other people's ideas.
- **Community management is about discovering commonalities.** If community management had to be boiled down to a single philosophy, it would hinge on engaging people who share the same passions.
- **A community mindset comes naturally.** Community thinking is more 'human' than standard transactional business thinking. People love connecting with one another, and building relationships – and you can tap into that to drive business growth.
- **Community management is not about reinventing the wheel.** Though we treat it like a novel concept, community management actually reflects historical approaches to business. Before mass media, businesses were built on relationships. Social media is bringing back that sense of community.
- **A strong community around a business facilitates deeper customer relationships.** The more you engage with your customers through community the more you can help people, educate them, listen and collaborate.

Key takeaway

Community management isn't just a role – it's a perspective. Community management is emerging as a philosophy and way of thinking about a functional discipline, rather than simply a role to be filled.

- **Hire with your community in mind.** Aim to hire people who believe strongly in the mission behind your company, and who possess a passion for the brand itself.
- **Listening is an invaluable business skill.** Your customer's voice is central to a community-centric approach.

Networked Market Understanding

- **You are part of a bigger ecosystem.** The more you think about your organization as part of a larger network, the better you'll connect with those you serve – and others that could positively or negatively impact their decisions.

- **It's still a business transaction – so don't forget the value proposition.** Yes, you're there to support and collaborate. But you want to do business, too.

Key takeaway

You are part of a bigger ecosystem. The more you think about your organization as part of a larger network, the better you'll connect with those you serve – and others that could positively or negatively impact their decisions.

- **You don't own your brand anymore.** We all have the ability to publish now – and the community promotes what it wants to promote. Some businesses are going to learn the hard way when people just stop listening to them. Businesses that listen and seek engagement will win the attention, and the business, of their markets.
- **Open your ears for some surprising perspective.** Social listening can uncover internal marketing priorities that are simply not relevant to your target buyers.

Leadership Tactics that Drive Change

- **Top 10 tactics for establishing an enterprise-wide social business initiative.** Conduct an internal audit; listen to customers; recruit strong leadership; establish a framework; set enterprise standards; utilize a consistent approach; establish governance; employ use cases; connect regularly with your network; and provide continuous education/training.
- **Education is the key to success.** Your senior executives, legal team – along with all other potential participants – need to do some personal, grassroots experimentation with social media before they can understand the bigger picture.
- **Keep it simple.** When you're training executives, or bringing teams onboard with social, avoid overwhelming them with too much information.
- **Use attention-grabbing tools to make your point.** A popular YouTube Video by Erik Qualman entitled "[Social Media is Not a Fad](#)" offers a more dynamic way to get your message across. Skip the slides!

Key takeaway

Education is the key to success.

- **Social initiatives are often emergent.** This journey often begins with grassroots leadership from someone who sees the changing opportunities and risks in the environment, and sees social business as the best way to respond.
- **An internal audit often shows that there is already activity happening in the social arena.** This helps to highlight to senior executives that all this organic activity could continue with zero governance or it could be structured in order to get the most value out of it. Audits can help get the ball rolling for broader funding and attention.

Key takeaway

Recruit leaders who are willing to be pioneers. The introduction of social might end up feeling like pushing a boulder up a hill. Your leaders need to be confident, risk-ready, and willing to ruffle some feathers.

- **Don't be the first to speak.** Take time to listen to what others are saying about your company in the social media space, before you barge in with a message and agenda of your own.
- **Recruit leaders who are willing to be pioneers.** The introduction of social might end up feeling like pushing a boulder up a hill. Your leaders need to be confident, risk-ready, and willing to ruffle some feathers.
- **Establish a framework.** Create a roadmap that outlines where the organization stands presently (a baseline), the goal (where you want to be), and an analysis of the gaps in-between. [Note: the [Community Maturity Model](#) can be used effectively in this way]
- **Don't waste time reinventing the wheel.** Implement an integrated social strategy approach to avoid reinventing the wheel every time a business unit wants to test social tools. Encourage them to vet their idea in the context of evaluation, design/ launch and manage/monitor. Business units that go through this process soon realize the level of commitment needed. Then, only the truly serious – and those most likely to succeed – will launch social initiatives.
- **Figure out where social can add real value.** Push for use cases that can add value within a safe context – until the organization becomes more experienced in its use. Prioritize social use cases based on which business groups have the appropriate level of resources and budget to execute.

- **Recognize the importance of networking.** Learn from others outside the organizations to develop a more consistent, informed approach. One organization cannot know all there is to know.
- **Break down the walls.** Businesses actively using social tools must give their employees access to social media sites – keeping networks blocked sends a confusing message. Broad adoption and understanding cannot happen without it.

Key takeaway

The technology is the easiest piece. Community management is going to be the hardest piece because that skill set and experience does not reside within most companies right now.

- **Don't see Legal as 'the bad guys'.** Yes, they ask tough questions, but that's their job – particularly within regulated environments. Continuous education and information sharing will be critical to overcoming concerns – as will finding advocates within the department to back up your efforts.
- **The technology is the easiest piece.** Community management is going to be the hardest piece because that skill set and experience does not reside within most companies right now.
- **Get the control functions of the organization on board first with social media before any meetings with the C-Suite.** The term 'control functions' refers to legal, compliance, fraud, information security, etc. You don't want to leave openings for excuses or delays by not getting everyone on board. While these groups are often treated as inhibitors of change organizationally, it's not fair to assume they're being negative for negative's sake. They want to support progress – but in a way that mitigates risk to the organization. Collaborate with them, and bring them on board. It's the only way you'll really get things done.
- **Keep your eye on the prize.** Always present your case to executives in relation to your business objectives. This is the only language the C-Suite understands. By connecting social with objectives, you show that you have the same core focus they do.
- **When discussing risk with your legal department, ask for real probability and 'worst case' magnitude.** When dealing with these control functions, be aware that for every objection they give you, it will be framed as a 100% probability – and the worst case magnitude. When you dig a little further to find out the true probability, then you'll be able to accurately frame a business case around opportunity, versus

cost, versus risk. And always ask your legal department to frame the size and the risk of doing something, versus not doing it. Armed with that information, you can present your case to a business head and see if they are willing to accept the risk. Their willingness to take on that risk will send a clear message about how seriously they want to take social.

- **Give them a taste of the competition.** Show the C-Suite what your competitors are doing with social media – both what they are doing well, and where they could stand to improve. If you show them how other companies approach certain legalities and issues, you let them know what’s possible. And by showing your awareness of potential issues and mistakes, you indicate your understanding of the risks and implications... and your lack of desire to follow in the wrong footsteps.
- **Play by their rules to get them in the game.** In some cases, it is important to ‘humor’ important constituencies with a nod to their desired constraints (like pre-scripted tweets and reviewing all posts.) Keep in mind: they won’t understand the new communications environment until they experience it. Typically, people will adjust their expectations after a small taste of the reality. But showing needs to happen – not just telling.

Key takeaway

Start small – and creative. The best way to receive funding and approval for a growing social initiative is to create a project plan small enough to be palatable to everyone. Then, when this small experiment succeeds and your business case is proven, you can scale up from there.

- **Start small – and creative.** The best way to receive funding and approval for a growing social initiative is to create a project plan small enough to be palatable to everyone. Then, when this small experiment succeeds and your business case is proven, you can scale up from there.
- **Understand when and how to ask for support and authority.** Seek agreement on high-level approaches, rather than specific tactics. Know which tactics your business is will be particularly sensitive to, and make sure your plans comply with, and consider these ‘deal-breaker’ concerns.
- **Be a risk taker.** If you are not that person, find a partner who is. Changing an organization takes a degree of professional risk – which could lead to a personal impact.



Culture

Organizational culture has a huge impact on whether and how a social business initiative succeeds – there is increasing awareness of just how critical it is. Culture, however, is complex, variable, and hard to describe... making it difficult to clearly understand where the biggest opportunities and challenges lie within an organization.

Many organizations have deployed social technologies only to find them fall flat. This is in part, no doubt, because they failed to make accommodations for the unique social pressures exerted by their organizational culture. For many organizations, success can be achieved by understanding their unique culture – and avoiding areas or topics that individuals aren't comfortable discussing within an open forum.

For others, a more complex undertaking of proactive cultural change will be required. This kind of evolution typically involves leadership adjustments, changes in formal incentives, and training and programming that encourages participation. Regardless, all community managers eventually find themselves involved in coaching, encouraging, and mentoring – and often discover that their culture changes (often in surprising ways!) as a result of deploying networked environments.

The more organizations can acknowledge and prepare for cultural challenges and change, the better they will be at navigating the twists and turns in the road, and reducing risks.

Training, Incentives & Encouragement

- **Talk about it before you live it.** Schedule ‘Social Media Socials’ or other types of informal get-togethers to advocate for, demo, and explore the benefits of social media.
- **Create a ‘social media advisory council’.** This technique has been used to help overcome social media evangelism challenges, as well as to increase documentation of the overall discussion.
- **Make the rules clear from the beginning.** Lines are becoming increasingly blurred between personal and business in the social community. Employees have a tendency to talk about their work and their employers on Facebook and Twitter. Therefore, to protect your company, create clear guidelines and put training in place so employees know where proper boundaries lie.
- **Use analogies your listeners will understand.** Most people think social software and social computing is relatively new, but the concepts have plenty of analogs in the physical social world.
- **Build in rewards.** People have a natural tendency to want to help one other – but they’ll get stuck if the process is complicated. Ensure that any reward/recognition system you create is relatively easy to use. If it’s simple to take part, people will be much more likely to get involved.
- **To create solid incentives, begin with a goal. Whatever goal you set out with your formal plan needs to be adopted and agreed upon across the organization.** If you want cross-organizational adoption, consider adding the goal to employee performance reviews. For this to be truly successful, communication is paramount – and keep in mind that, since it is still up to individual managers to implement, you will not have 100% adoption. The second part of this plan would be to include this type of program within an individual’s professional development promotion expectations (i.e. use of the plan is required for promotion.)
- **Include everyone – and keep it simple.** If your company has the goal of including all personnel in at least one internal community aligned with their individual expertise, you’ll see a large pool of potential participants. Then, if you have the right tools – and they are simple and easy to use – chances are that communication will actually occur.

Remember, integration with email is critical because most people read their email regularly throughout the day. Checking websites or RSS feeds is a much less intuitive and automatic process.

- **Beat the cheats. Incentive systems are often doomed to fail – people can't seem to resist gaming the system.** Using “soft rewards” – which are harder to quantify, and thus game – is typically a more successful approach. These types of rewards include peer recognition, executive recognition, and keeping people in the loop on cool projects (which helps them gain a positive reputation for future connection and collaboration on projects.)
- **Focus on cooperative goals.** If you want your social approaches to succeed, stop measuring individual performance and start measuring group performance.
- **Build trust with members.** If trust and rapport exist between the organization and the community members, changes will be easier to implement. In fact, community members will actually rally to support the changes if a strong relationship exists.
- **Constant communication is vital.** Keep your members informed, and practice transparency when you communicate.
- **Involve your community offline.** Giving community members the opportunity to interact with one other and your leaders is a good way to establish trust and confidence within the community. These interactions also offer you the tools for promoting the community to leaders inside your organization – they can see first-hand what sorts of insights can be gained.

Key takeaway

Focus on cooperative goals. If you want your social approaches to succeed, stop measuring individual performance and start measuring group performance.

- **Don't let changes sneak up on your members.** Be proactive with your community about upcoming changes – and why they are happening.
- **Give everyone a voice in decisions.** Community members will be far more likely to give you the benefit of the doubt if they are included in decision-making processes.
- **Learning is at the core of any community.** People often resist learning because of a history of roadblocks in their past (too hard, too time consuming, etc.) The trick is to remove the roadblocks that keep people from wanting to learn – from there, you'll see a dramatic uptick in their motivation.

- **Don't forget that community members can have long memories.** Even after issues have been resolved, they will resurface. This is why communication and inclusion is important as soon as issues arise.

Key takeaway

Learning is at the core of any community. People often resist learning because of a history of roadblocks in their past (too hard, too time consuming, etc.) The trick is to remove the roadblocks that keep people from wanting to learn – from there, you'll see a dramatic uptick in their motivation.

Share Successes

- **Celebrate the wins.** Share successes via an email distribution list of interested parties, via your community, via physical notice boards, and via presentations. And remember to keep what you share focused on the audience to whom you are speaking.
- **Find advocates and encourage them to share successes.** These stories have much more resonance coming from existing leaders and community members – rather than from those directly responsible for the community's success.
- **Don't let a moment pass unmentioned.** Be sure to squeeze every last drop out of your social media and/or community successes. These are the moments that will drive your growth and acceptance.
- **Be prepared to let the outside in.** Companies need to understand that if they are going to go down the path of community, they'll sometimes end up with external individuals involved in matters that might normally be discussed behind the closed doors of the executive suite.

Key takeaway

Be prepared to let the outside in. Companies need to understand that if they are going to go down the path of community, they'll sometimes end up with external individuals involved in matters that might normally be discussed behind the closed doors of the executive suite.

Evangelize

- **Strategies for evangelizing naysayers and skeptics.** Meet with the skeptics in an informal setting vs. a business meeting; acknowledge any concerns and show concrete examples (ideally, examples that resonate with the individual's pain points) as to how social media can be of assistance; make videos to tell dynamic, visual stories about social media.
- **Rely on relationships.** Arrange for peer-to-peer connections versus 'authoritative' connections when evangelizing social media.
- **Get multiple positive voices on your side to overcome company culture.** Company culture is the biggest hurdle when it comes to successful social media evangelism. Even if you have a senior level supporter, that person could end up leaving the company, or assuming duties with conflicting priorities. Always be on the lookout for new supporters to generate a groundswell of interest.

Key takeaway

Rely on relationships. Arrange for peer-to-peer connections versus 'authoritative' connections when evangelizing social media.

- **Help them see what they're tripping over.** The first step to successfully removing cultural roadblocks is to help people understand the obstacles – both self-imposed and organizational – that are impeding them from digging into new tools.
- **Ensure they see 'what's in it for me.'** You want to convince individuals (particularly subject matter experts) that participation will actually reduce their workload, not increase it. Demonstrate this by directing people to a single location with all the subject matter expert's resources collected for handy reference. This will reduce the amount of time the expert is called into meetings, asked to sit on projects, or respond to phone queries, simply because his/her expertise is more easily accessible.
- **Ask for the truth, even if it hurts.** Ask people outright what they think about social media. Typically, there are a couple of consistent answers: 'I have nothing important to say' and/or 'Other people are going to say something dumb.' Both of these statements reflect the conflict between organizational dilemmas and individual dilemmas. The first statement indicated people do not feel that they are being heard (and possibly respected) within their organizations. The second statement reflects trust issues.

Key takeaway

Ask for the truth, even if it hurts. Ask people outright what they think about social media. Typically, there are a couple of consistent answers: ‘I have nothing important to say’ and/or ‘Other people are going to say something dumb.’ Both of these statements reflect the conflict between organizational dilemmas and individual dilemmas. The first statement indicated people do not feel that they are being heard (and possibly respected) within their organizations. The second statement reflects trust issues.

- **Use the tools to solve a problem.** To illustrate the practical value of social tools, get people to use these tools to solve a problem. This practical application will help them to realize the benefits of social approaches for themselves – rather than trying to sell the benefits to them. Also, don’t try and give your participants all the information they need before they even enter the social network. Let them know that they can find all the answers and support there that they might need.
- **Shift the mindset.** When describing social media/social learning, don’t position social tasks as something ‘extra’ the person has to accomplish. Rather, these tools will help them do what they’re already doing more effectively.
- **Sales and marketing people are innately people-oriented.** If they can step back and view the work they do and their involvement with communities as a means to help somebody get from where they are to where they want to be, the conversation becomes dramatically more positive.

Key takeaway

Shift the mindset. When describing social media/social learning, don’t position social tasks as something ‘extra’ the person has to accomplish. Rather, these tools will help them do what they’re already doing more effectively.

Support Community Leaders

- **Give your community manager the authority needed to run the community.** They need to have the power to say what needs to be said. They also need the authority to go directly to the right source for answers – and, in turn, receive a straight answer. Furthermore, they need to have the authority within the organization to actually set solutions in motion.
- **Acknowledge the often overwhelming nature of the community manager role.** It is almost impossible to be partially involved with your community.



Community Management

There has been a lot of attention paid to community management in the last year – driven by the adoption of social technologies; the recognition that social business is more than technology adoption; and organizations like [Edelman Digital](#), [Enterprise 2.0 Conference](#), [Altimeter Group](#), [Dachis Group](#), [Mashable](#), and others actively promoting it.

At a high-level community management is the discipline of ensuring productive communities and it includes the following responsibilities:

- Define ideal scope, desired outcomes, and necessary boundaries
- Ensure participants receive more value than they contribute
- Promote, encourage, and reward productive behaviors
- Discourage and limit destructive behaviors
- Facilitate constructive disagreement and conflict
- Advocate for the community and its members
- Monitor, measure, and report
- Marshal internal advocates, resources, & support
- Manage tools and member experience

Depending on the purpose, size, and strategic importance of the community initiative, these responsibilities can be handled by one or a large team of people. The larger the initiative, the more individuals and executives need to understand the elements of community management and how they all work together to influence and support the community. When the network spans an enterprise, multiple hubs of community management expertise need to exist within the organization, coordinated by a central team to ensure consistency of approach and coordination across business units and functional groups.

Promoting Engagement & Productivity

- **Best practices for increasing external community engagement:** A) a rewards and recognition program; B) top evangelist acknowledgements; C) log in promotions; D) contests and high-touch campaigns; E) opinion lab feedback.
- **Best practices for increasing internal community engagement:** A) Internal social network; B) a social media resource center; C) community and social media training; D) internal awareness campaigns.
- **It's counterintuitive but do not jump in and automatically answer questions or help out.** The benefits are the fostering of peer-to-peer interaction, alleviation of off-hour and weekend stress for the community manager to be available and more credibility in a sales situation if a satisfied customer can help a possible customer.
- **Conflict is not necessarily negative.** A dispute can demonstrate active engagement. It is only when the dispute reaches a particular level that somebody needs to step in to resolve it.

Key takeaway

It's counterintuitive but do not jump in and automatically answer questions or help out.

- **Constructive conflict is required to innovate.** Encourage individuals to share different opinions respectfully.
- **Members add value in a variety of ways.** Examples of value contribution are moderation, group leadership and/or content creation. However, also consider the lifetime value of the customer, i.e. people who add value by the way in which they network, bring people into the community and retain members in the community.

Key takeaway

Constructive conflict is required to innovate. Encourage individuals to share different opinions respectfully.

- **Consider “The 5 C’s of Community” in order to provide value (the centerpiece of community).** They are content, context, connectivity, continuity and collaboration.
- **Communities form around shared interests and participants seek value from them.** It’s important that marketers working in the social media space do not keep pushing out messages to try and sell something. They must offer value to the community, get their attention and gain their permission to sell and promote.
- **The five steps towards community engagement:** assess community needs and interests, develop rules of engagement, identify managers that are right for your community, establish internal and external practices, train, equip and deploy (TED Model).
- **Best practices for creating community engagement.** Engage community members directly, encourage participation, escalate important issues to the appropriate practice/channel, and make it conversational.
- **Bring humor into your community because it fosters relationships.** Consider having a separate area for more light-hearted, humorous conversations that may also be off-topic from the dialogue in the regular community.
- **It is imperative that you know your audience and/or who you are talking to in order to determine if he/she can handle the humor.** This is especially true with email or any other written form.
- **Be aware that people react very intensely to being shut down too hard.** Be very cautious in how you tell someone that his/her humor is inappropriate or crossing the line.
- **One way to find out the tolerance level of your community is to offer polls on videos, etc.** to explore what participants find funny and what they do not.
- **Meeting face-to-face changes things.** As soon as you meet a person face-to-face, the tone of your future conversations and dealings with that person will be different. From then on, more familiarity and humor can be brought into the conversation and in writing because you have a better sense of the individual’s personality.
- **Some people and communities are not naturally funny.** Do not force humor into the community if it goes against the general tone of the community.

- **In an incident where someone misconstrues something that someone else has said, everyone becomes really intense for a while and concerned with how and what they say.** However, people have short-term memories. After a while, it dissipates and they become more comfortable again, but are also more conscientious about what they say.
- **Consider hosting local F2F events.** They tend to foster loyalty and help build your online fan base. Train your best community members to host these events to scale these types of activities.
- **When marketing budgets are tight, piggy back on another large event that caters to your audience.** Schedule your event the day after so that it increases your chances of attendance. Attendees have already paid for their airfare and only need to extend their accommodations by one day.
- **Partner with other relevant companies to help share the cost of the local events.**
- **Manage Facebook and Twitter as separate communities.** Twitter is more for rapid blast types of content. There is a chance your tweet will be seen and a chance it will not. Conversely, your post is more likely to be seen and responded to on Facebook.
- **Worst practices for creating engagement?** Forget to self-identify, delete comments you don't like, and be rude (even when they are).
- **How to get subject matters to contribute to community?** Explain how sharing responses in a community will help their expertise scale and allow them to spend more time evolving their expertise (vs. continually answering the same questions).
- **Involving vocal dissenters of the community in decision-making can be a positive way to channel their energy, but it can backfire, too.** Consider using different groups of people so that no one person feels they have an "in" with management.

Key takeaway

Consider hosting local F2F events. They tend to foster loyalty and help build your online fan base.

Manage Boundaries

- **Set expectations.** When engaging in new environments, it will open up other communication channels that will need to be staffed, including weekends.
- **Ways to Set Expectations.** A) Have moderation staff available 24/7 in shifts where possible if the community is active around the clock; B) Try not to post in the forum on off hours; C) implement automation where possible; D) encourage forum members to help others.
- **When building a new community, it is critically important to set the availability expectations with customers upfront.**
- **Dealing with conflict.** As a community manager it is imperative to establish rules with enforceable consequences for violations.
- **Asking members to contribute to the formation of the guidelines helps them abide by these guidelines and creates a sense of ownership.**
- **Include the community in determining consequences:** Create a voting committee within the community to decide on the consequences for inappropriate member behavior.
- **Recognize that some comments are intended to incite.** The hardest thing to do in this type of situation (but often the correct reaction) is not to respond. However, some situations do require immediate response. Conflict resolution (ADR) training is recommended for all community managers.
- **Place a phone call to an individual who exhibits inappropriate behavior.** This works well and often surprises the member.

Key takeaway

Include the community in determining consequences.

- **It's ok to delete or moderate comments that are an attack** (an attack that could have severe repercussions to someone's reputation, the revealing of personal information and/or an attack that inhibits the individual's ability to remain gainfully employed). It's typically not ok to delete/moderate negative or critical comments.
- **Sometimes a situation can easily be diffused by responding to the individual calmly and rationally.** Ask why the member is frustrated. Generally, the person just wants to be heard and recognized. The better you know the members of the community the easier it will be to tell whether issues are legitimate or intended to incite reaction.

- **In a community's rules of engagement**, it is advised to have something that states that an individual may not disclose private facts pertaining to other individuals and/or not knowingly spread false rumors.
- **Consider using war-gaming communications options before contentious responses are made public.**
- **Recognize that often times, people who enjoy creating conflict online are simply looking for attention.** Do not give it to them.
- **In the experience of the members who work in professional communities, the behavior generally remains professional.** The wanton behavior is more frequent in the communities that are open to the public.

Key takeaway

Consider using war-gaming communications options before contentious responses are made public.

- **Beware of the truly disturbed individuals.** Some people may be functioning in society, but they are pathological. Use caution when sharing personal information, particularly with geolocation apps. Have an escalation plan before you need it, even if that is just the contact info for legal counsel or appropriate law enforcement organizations.
- **Understand that the moderation services required will be dependent upon where you are in the life cycle of that online community.**
- **An essential moderation tool to have in place is one that has the ability to suspend a member's account for policy violations** and then to block their IP address if they persistently set up new accounts.
- **Set the tone of your community;** lead by example and show members how you want them to behave.
- **If allowing any type of self-moderation, ensure that the proper tools and processes are in place to report any violations.**

Key takeaway

Have an escalation plan before you need it.

- **Understand the differences between pre- and post-moderation and how they are best used within different types of communities.**
- **Be very aware of COPPA compliance, particularly if your audience is the 13 and under crowd.**

Key takeaway

Lead by example and show members how you want them to behave.

- **Publishing platforms are available that can automatically offer post-moderation posting after a few acceptable posts.** This is a good best practice that eases the burden of moderation once members have reached a certain threshold of trust.
- **Step in the minute the discussion becomes malicious in nature.** If a person is hurting your business or the experience of others, it's up to the moderator to disable that interaction.
- **Not every rant from a member is reflective of your brand or personal interactions. Recognize that people have issues.** To that end, not every member can be rehabilitated to conform to your guidelines. Know when to sever the relationship.
- **Active participation in your online community means you don't want to be the bad guy.** Consider third party moderation.
- **When members are asked to moderate, they don't always like to enforce the guidelines.** This is the community manager's job.
- **Generally speaking, children are more tolerant of pre-moderation than adults.**
- **Third party moderation companies can be cost effective and add flexibility, even with homegrown platforms.** Another benefit is that the moderator is not seen as policing the community.

Understand Human Behavior & Dynamics

- **The four motivations behind giving and sharing: altruism, enjoyment, status seeking and reputation seeking.** All four of these characteristics can coexist in each member and can fluctuate in ratio depending on time and circumstance.
- **Understand the prime lever or motivator within the community.**
- **Understand lurkers by understanding why members choose to belong to the community.**

Key takeaway

The four motivations behind giving and sharing: altruism, enjoyment, status seeking and reputation seeking.

- **Be aware of the social norms within your community to ensure that it is not inadvertently fostering disengagement.** When cliques form, they can shut out others and create a barrier to participation that is hard to overcome.
- **Ideas to encourage engagement:** A) create a guide showing members how to increase their status and reputation; B) Show how someone contributing to the community compares to others in the community but do so cautiously as it can spur increased participation, but can also be a turn off if handled wrong.
- **Consider the use of a point system to assist members with building their reputation and status if these elements are present in the motivation of the community.** However, be aware that gaming can be tempting in this kind of environment.
- **For some people, contributing to online communities is a way to build their reputation via altruism.** These individuals are keyed into the reciprocity factor.
- **Be careful with reward systems as people will try to game the system if it is too easy to discern.** You will get the behavior that you reward, so make sure that it is the behavior that you want to see and understand you may be training them to only do something if they receive recognition or a reward if the reward is consistently awarded.
- **A “networker” persona in the community will gain enjoyment from helping members meet each other.** For this individual, their motivation is reputation seeking and altruism.

Key takeaway

Be aware of the social norms within your community to ensure that it is not inadvertently fostering disengagement.

Key takeaway

It's ok and often best to jump channels.

Workflow and Communications Tactics

- **The social space is about personal connections.** Strongly consider using a personal picture in your ID vs. a company logo.
- **It's ok and often best to jump channels.** Encountering a customer service issue via a social media or community channel and then reaching out to the customer by phone is much more personal. It allows for the more effective resolution of the customer service issue
- **The social media space is about personal connections.** It is a channel that is owned by the customer, not the company as a marketing avenue.
- **Engage “super users” to assist others in your community.** Peer-to-Peer support is very often faster and more appreciated than organizational responses. Customers will also often defend the company.
- **If using Twitter for a support channel, follow everyone who follows you back (except for clear spammers).** By following them, it allows the individual to DM you.

Key takeaway

Become a storyteller. Relaying your customers' stories to the company is a powerful way to endorse your market's message and influence positive change.

- **Avoid talking politics at all cost in a business context.** You will always risk offending someone.
- **Become a storyteller.** Relaying your customers' stories to the company is a powerful way to endorse your market's message and influence positive change.

Promote Community Leadership

- **Create Ambassador Programming:** This is a way to energize and create and a place to touch base for some of your best advocates. Ambassador programs look a lot like community programs but are generally more intimate.
- **In communities that consist of a majority of volunteer moderators, these individuals need to be managed, guided, trained and nurtured.** The result is that they become their own community and support each other.
- **Beware that not all supportive, active and valuable members of the community make good leaders/moderators (they may lack the required people skills) – find other appropriate roles from them to fill.**

Evangelism and Internal Culture Change

- **Don't underestimate the importance of senior level support for any social initiative.**
- **The use of social media can change the culture of an organization and add more emphasis on being customer-centric.**
- **Schedule regular brown bag lunches or show and tells that help others understand social tools and the organization's social initiatives.**

Key takeaway

Regularly offer one-on-one coaching sessions on technologies for senior managers and executives.

- **Regularly offer one-on-one coaching sessions on technologies for senior managers and executives who may not feel comfortable learning in a group setting.** It is also a good excuse to build a relationship with stakeholders.
- **Create a monthly report of your activity and send to key stakeholders.**
- **Take the time to endorse other community managers who have helped you by sending an email to that community manager's boss – it will help a colleague while promoting the role of community manager.**

Managing the Role of Community Manager

- **Community management can be an all-consuming job.** In order to establish a work/life balance it's important to learn to say no, set expectations, ask for help and set personal and professional boundaries.
- **Help others in the organization to understand the community manager role, particularly as it relates to the amount of time required to fit in all the needed tasks in a day many of which are hidden.**

Key takeaway

Seek out mentors. Reach out to other community managers for support and guidance on how to juggle the role and set priorities.

- **Seek out mentors.** Reach out to other community managers for support and guidance on how to juggle the role and set priorities.
- **Consider “chunking out blocks of time” or adding tasks to your calendar, i.e. setting aside an hour to blog or attend to a personal matter.**
- **Society is in transition in terms of the way we work and this is particularly true of people in community management positions.** With that in mind, do not think that your boss is not feeling the same balancing pressures that you feel so work with her or him on setting manageable boundaries.

Skills, Experience, & Attributes of Community Managers

- **Understand the difference between expertise and attributes when hiring for community management.** The top attributes of a Community Manager are the desire to be helpful, someone who is concise and credible, a sense of humor, curiosity, fearlessness, influential, persuasive, diplomatic, patient and mature. The expertise required for the role of community manager is strategic business acumen combined with exceptional communication and people skills.
- **Tactics for interviewing:** Ask the candidate how they would feel being the sole person to deliver bad news to a room full of people (the role requires the ability to defend their opinion if they disagree with what is being proposed within his/her community). Don't follow an interview script because the role requires so little structure

(see if the candidate can keep up with you in the interview). Be friendly and get the candidates to talk about themselves in order to understand their personality and whether or not you can work with them. Involve other people in the interview process who have differing opinions than you to help you spot personality biases.

- **Go with your gut.** Don't discount your gut instinct when hiring a community manager.
- **When hiring for customer service, community management, or social media, asking "What do you think is wrong with us?" is a powerful question.** This is a pass or fail question. Answering from the customer's viewpoint with added recommendations to solve the problem is a good way to determine fit for the position.
- **Culture is key.** Keep your company culture in mind at all times when hiring for your community. The perfect fulfillment of requirements means nothing without culture fit.
- **Look everywhere.** When hiring, always wear your recruiting hat. Watch for potential candidates on Twitter, Facebook, at conferences, etc.
- **Understand the advantages and disadvantages of hiring young.** Young people are trainable and don't come with pre-conceived notions. However, they are more likely to lack the judgment about what is appropriate and when to escalate issues.
- **Hire for diversity.** Team collaboration requires team members who have different perspectives and can offer constructive confrontation.
- **Consider hiring from the community, but beware.** Members shared that they did not always have favorable experiences with hiring from the community. The candidates did not always have the necessary business or communication skills and they were unable to deal effectively with their internal colleagues. They also often can communicate well in a forum, but not necessarily in person. Other issues included having employees located all over the country; having employees too friendly with many in the community and, as a result, did not always support the company; and having employees that were too narrowly focused on their area of expertise within the community and did not always channel those same energies into other segments.
- **Hiring from within the company can be advantageous.** The candidate knows the company culture and its customers.
- **No free lunch.** Members were in agreement that many companies want to hire a manager level title and salary with director responsibility.
- **Can community management be done part-time?** In the long run, the role typically requires the dedication of a full-time position to be truly effective.



Content & Programming

Content and programming are critical elements of successful communities. People tend to develop relationships while participating at events, or while interacting around content and topics.

While members of strong communities tend to come back for the relationships, content and programs often provide the first ‘way in’ for new members – and encourage existing members to reengage.

Content strategy can have a significant impact on the cadence of your community, the level of activity amongst your membership, and the ratio of what is published by you, versus what is published by your users. Content strategy is also something quite likely to evolve as a community matures and begins to generate more content through member contributions.

In the last year, we have seen the thinking in regards to social content change in the following ways:

- More emphasis on integrating content plans across channels
- More attention to community newsletters
- More informal content designed to encourage higher participation rates
- More focus on curation, editing, and organizing vs. content development

Content Strategy

- **Your content strategy needs to be focused on both your audience AND your goals.** Customer-centric content highlighting a company's top 20 problems and offering tutorials to overcome those problems may have a very small audience. However, it could also prove to reduce support tickets or customer service issues by 10 - 20%.
- **Audience is key.** If your goal is to create relevant content, you must first understand your audience, and WHY you are creating the content.
- **'Virality' isn't guaranteed.** Frequently and rapidly shared content requires as much luck as it does strategy, so think about your content as a portfolio – with each piece providing different value.

Key takeaway

Your content strategy needs to be focused on both your audience AND your goals.

- **Consider adding more video content.** If you want to encourage viral sharing, keep in mind that video is some of the most often shared content online – and incorporate it into your strategy.
- **Put a face to your content.** Thought leadership-oriented content needs a name attached to create a connection... after all, people are drawn to people. There are risks associated with this strategy – as there always are in promoting an individual as well as a brand – but attaching a personality is the most effective way to add resonance to your thought leadership messages.
- **Be up-front about your pitches.** You can include sales and marketing in your community – as long as you act with a pre-determined and agreed-upon plan with clear expectations. Clearly label it as marketing material when presented to your community.

Key takeaway

Create content that fills a needed gap. Ensure your content has a unique angle, and fills the void for information missing in the marketplace.

- **Don't be scared to loosen up a bit.** For companies trying to reconcile their need for professionalism with the informal nature of social media, showing them the impact of compelling informal content will help them start to see its value.
- **Pull in users from social channels by providing value.** If you want people to spend more time on your community than on Facebook, you'll need to provide them with compelling reasons to stick around.
- **Put your members in the spotlight.** Creating a blogging opportunity for active community members will increase engagement, traffic, and audience reach.
- **Ask the people what they want to hear.** If you're not sure about what content might be relevant to your audience, dig in to their interests and needs with conversations and surveys.
- **Reward with recognition.** Compensation and rewards are not always needed to make your members feel appreciated. Recognition is a powerful motivator for many – particularly executives.
- **Encourage content generation.** The more you solicit and appreciate content from your most loyal consumers, the more engagement you'll see on social channels.
- **Create content that fills a needed gap.** Ensure your content has a unique angle, and fills the void for information missing in the marketplace.
- **Consider the use of syndication across multiple social media channels.** If you are looking to build awareness, syndicating your unique content to interested platforms and channels is very effective.

Key takeaway

Don't try to be everything to everybody – or your content will be nothing to everyone.

- **Don't try to be everything to everyone – or your content will mean nothing to anyone.** Speaking to unique audience segments may require the development of parallel communities with similar topics, but the increased focus will maximize your appeal of your content.
- **Understand the 'New Media Lifecycle' for promoting content through social media channels.** The phases are experimentation, adoption, gestation, escalation, consolidation, and maintenance.

Content Planning

- **Create content plans that bridge your audiences.** If you look at your content holistically and broadly, you'll be more relevant to your audiences, and do a better job of meeting their needs. As well, planning from this perspective will provide you a roadmap and a plan for allocating resources.
- **Create an editorial calendar.** An information event series is an easy way to stay on track, too.
- **Stay Focused.** Decide on the strategy/direction for your content, and follow through according to the plans you set. Work to achieve your goal – rather than trying to satisfy everyone.
- **Stick with it.** If you make a commitment to produce recurring content (blog posts, podcasts, monthly eBooks), you need to follow through. If the plan is unrealistic, don't commit.

Key takeaway

Create content plans that bridge your audiences. If you look at your content holistically and broadly, you'll be more relevant to your audiences, and do a better job of meeting their needs. As well, planning from this perspective will provide you a roadmap and a plan for allocating resources.

- **Help executives understand 'messy' content.** While the need for this will depend on the executives you're working with, take the time to show the executive examples of the type of content that you would like to produce, and how successful that type of content has been for others. Help the executive understand the characteristics conducive to the content, and the standards you want to achieve. For example, you could demonstrate that video quality does not need to be perfect to be successful.

Finally, develop a plan that mitigates risk. A contingency plan shows that you've given every step of the process the level of thought it deserves – which should give any cautious executive some comfort.

- **If you plan to blog, make a point of defining your blogging style.** Blog styles can include short form posts, long form posts, curated lists of links, character profiles, interviews, and topic series. A defined style helps your readers develop expectations for what they'll receive from your content.
- **Invest in quality equipment.** If you're planning to do a lot of audio and video interviews, purchase a good quality microphone. Save money somewhere else – audio quality is typically more important than image quality.
- **Make 'em laugh.** Comics are emerging as an online communication and engagement medium.
- **Be realistic about the time you have to put into content development.** Blogging, podcasting and videocasting use basically the same technologies. The biggest difference between them is the level of effort involved in creating the content. Blogging tends to have the biggest bang for the buck, while video content is the most difficult and expensive to create. However, podcasting offers benefits over blogging and/or videocasting: you are less constrained by time limits for your content, and it is easier and less expensive to produce than video. Podcasts also offer a great excuse to talk to people and hone your interviewing and relational skills. You can even use them internally for groups like your sales force to reduce emails and keep them updated.

Key takeaway

Keep attention spans in mind. Consider the length, quality, quantity, portability and “snackability” of content when you're planning. A variety of different types and lengths of content will most successfully address the spectrum of community member needs.

- **Don't forget images.** Visual content motivates us to speak, and may also help us listen more effectively when used alongside voice/audio content. Visuals can also help clarify communication. We are more likely to see nuances within an image that we might not sense in black and white text.
- **It's okay to get a little help.** Ghostwriting is fine... as long as it is not deceptive to your audience.

- **Keep attention spans in mind.** Consider the length, quality, quantity, portability and “snackability” of content when you’re planning. A variety of different types and lengths of content will most successfully address the spectrum of community member needs.

Content Development

- **Eyes or ears?** Before publishing podcasts or webcasts, consider whether audio or video is the best medium for your message – and your audience’s content consumption preferences.
- **Create unique content.** Highlight a problem and how your customers solved it with your company product or service. Profile your product through your customers... without resorting to a sales pitch.
- **Content re-use can make your life easier.** If you record a video, you can use it as a webinar, strip off the audio to make a podcast, and even produce a transcript for a blog post.

Key takeaway

Don’t put all your eggs in one basket. Mix up content topics, types, and venues.

- **Templates can provide the structure you need.** One of the key aspects of print publishing and television news is the formulated nature of the content. Using templates for effective social content generation can help you deliver a higher quality piece, and help set audience expectations. For example, if you do an interview series, ask each interviewee the same questions.
- **Don’t put all your eggs in one basket.** Mix up content topics, types, and venues.
- **Highlight executives by showcasing what they know.** Q & A posts, videocasts and live blogging of executive presentations are all great ways to publish senior management thinking in social environments – without resorting to ghostwriting.
- **Consider social reporting to encourage user content.** Encourage your audience to live blog, live tweet, graphically record, photograph and/or video relevant events. This creates a strong sense of participation and engagement, and increases content buy-in from your community.
- **Consider re-publishing related blogs from other bloggers.** Share great content – but always with full attribution.

- **Get in the habit.** If your preferred communication mode is writing, take the time to do it daily. It becomes a habit and makes writing easier.
- **Reach out to others if you're facing writer's block.** You don't always have to be the expert! Consider interviews as a solid source of content creation.
- **Adjust your content types (text, audio, video, short form, long form, live) to fit your audience.** Then continue to test and gauge response as your community grows and matures.

Key takeaway

Practice the 80 – 20 rule. Write complete content (80%) but leave room for others to contribute and finish the story (20%).

- **Keep visual cues in mind.** Your content and visual design should be aligned in tone and feel.
- **Be a great host.** User generated content facilitation takes some control away from you, but you can increase your chances of success by setting the tone up front with your invitations, who you include in the conversation, and how you respond to contributions.
- **Create a content ecosystem that centers on your community.** Form a solid hub, with spokes reaching out to the relevant social networks for your audience.
- **Practice the 80 – 20 rule.** Write complete content (80%) but leave room for others to contribute and finish the story (20%).
- **Answer your own questions.** Be the first to reply to your posted question, and model the response you expect from others.
- **If your goal is engagement, ask great questions.** Questions should be very specific and intentional, so your audience knows how to answer.
- **Don't forget your lurkers.** Even though they don't comment, they're reading your content. They're watching how you respond to others. Write for their needs, as well.

Key takeaway

If your goal is engagement, ask great questions. Questions should be very specific and intentional, so your audience knows how to answer.

- **Pick great brains.** If you are looking for inspiration, talk to smart people outside of your network.
- **Start a content ‘swipe’ file.** Keep a running list of content ideas, outlines, and drafts.
- **Include others in your content.** This is the best way ensure content sharing, since your featured members will be excited to send your content to their network of friends and family.

Key takeaway

Curate content for digital influencers. Ensure that the content is unique by putting your brand spin on it, i.e. take an article on vaccines, and use it as an opportunity to share the company’s view on vaccines.

- **Don’t stick with the facts.** Include a voice and viewpoint into your content. You are the element that makes your content distinctive. Information is everywhere – but you aren’t.
- **Avoid the hard sell.** Self-promotion falls flat – but you can avoid it by being personal and authentic in your responses, and focusing on ideas.
- **Curate content for digital influencers.** Ensure that the content is unique by putting your brand spin on it, i.e. take an article on vaccines, and use it as an opportunity to share the company’s view on vaccines.

Content Publishing

- **Set the tone.** Consistency and cadence are critical in your content production, as they model your expectations for member engagement.
- **Keep the unique use patterns of podcasts in mind.** Due to the nature of how people consume podcasts (they usually download them on a weekly or bi-weekly basis), you can stay current on even a single piece of content a week.
- **Don’t throw out older content.** Compelling content stands the test of time. However, find ways to refresh, re-purpose, or re-highlight legacy content to maximize its value.
- **Appreciate your reader responses.** User comments and votes are often more valuable than the original content.
- **Write a solid summary.** A short write-up of your podcast or video will be instrumental in getting it both discovered and distributed. A blog post to launch your content with relevant key words is an SEO must.

- **Be transparent in posting your content.** Don't pass off marketing content as anything but marketing content – and never claim someone else's work as your own.
- **Keep your content creators in the loop.** Technical platforms make it easy for community managers to move, branch, and combine content – something that can be helpful to members over time. However, make sure to let content creators know that you've moved it!
- **Create structure that suits your content.** Depending on your audience, your specific users, and the maturity of your community, make smart choices on whether particular pieces of content should be front and center, or if users should be guided to it.
- **Don't hand over all the goods.** Embedding the occasional video or the occasional audio file on a Facebook page helps to keep content fresh. But Facebook should be a spoke vs. a hub for a very simple reason: Facebook owns your content.

Key takeaway

Set the tone. Consistency and cadence are critical in your content production, as they model your expectations for member engagement.



Policies and Governance

As the use of social technologies and approaches have grown, the need to understand the regulatory, privacy, copyright, and cultural constraints has increased alongside it – and more mature forms of governance and policies have emerged. Many employee policies used to prohibit use of public social networks – but more and more now encourage use (with some key boundaries.)

Enterprise governance structures have also evolved now that social approaches are used by a wide variety of functional groups across organizations. The predominant approach by medium and large sized organizations with existing experience is the ‘hub and spoke’ model: some centralized governance and coordination, employing relevant control and operational functions that support business units employing social methodologies.

Regulations, however, have not quite kept pace with technical innovation, and many aspects of online interaction are still governed by outdated assumptions. One of the more basic examples is the legal right of photographers to own images of others – if individuals are captured in a public environment. In the offline world, these images are

fairly anonymous. Online, due to third party social tagging, pictures can be published and associated with an individual without their involvement – initiating privacy concerns that simply did not exist before the Internet.

As social business initiatives expand, it is critical for social teams to understand their regulatory constraints, the risk profile of their organizations, and how to translate concerns into understandable policies and guidelines for the individuals who participate.

Guidelines & Policies

- **Recognize that ‘policies’ are not the same as ‘guidelines.’** Guidelines are the expression, in accessible language, of the culture you wish to promote, and community boundaries. Policies are legal terms that govern those who agree to participate.
- **Identify legal concerns early.** Discuss policies with your legal team months ahead of the launch phase, and allow enough time for feedback and negotiation.
- **Show respect with your tone.** When crafting guidelines and policies, be aware of the tone your words are setting. Operate with an expectation of individual responsibility.
- **Set reasonable parameters.** Encourage employees to use social media. However, expect them to avoid the release of proprietary information, or to refrain from posting any negative commentary about individuals, customers or other employees. Give examples to simplify what employees can and cannot do.
- **Recognize that all online actions are somewhat public.** People don’t always realize they’re publishing to a broad audience. Online publishing gives people a false sense of anonymity that lowers their guard. Reinforce the need to be mindful with employees and community members through your guidelines.

Key takeaway

Recognize that ‘policies’ are not the same as ‘guidelines.’ Guidelines are the expression, in accessible language, of the culture you wish to promote, and community boundaries. Policies are legal terms that govern those who agree to participate.

- **Create specific policies for community members acting on behalf of the organization.** While you want to encourage community leadership, there is a point at which republishing content on other channels, speaking for the community, and other related actions could become infringement.

- **Recognize the risk of using public networks for support.** You may inadvertently highlight all the things you cannot do (particularly under regulated circumstances), even if you set up strict rules for use of particular venues. You may also open up a channel for backlash in an environment where self-defense isn't always possible. The opportunity often outweighs the risks – but understand the risks up front, and create a plan to mitigate them.
- **Establish guidelines for how employees are expected to behave on social sites.** As representatives of your brand, they need to be mindful of the image/reputation of your company.
- **Offer employees amnesty to come forward with their social media use (i.e. unapproved blogging).** And be sure to do this before embarking on publishing new social media policies.

Governance

- **Keep key issues top-of-mind when structuring governance:** regulatory environment; size; culture; strategy; and social business maturity.
- **Centralize the role of the social team.** Set the team up to work with internal and external partners as well as with many internal functional departments and business units.
- **Understand potential response requirements in relation to social and community channels.** War-gaming can help identify response workflows. At a minimum, if you are active on social channels, formalize relationships with the functional areas needed in order to respond.

Regulation

- **Realize that online privacy is a largely unresolved issue.** Technology is clearly ahead of legislation. One of the issues generating the most controversial discussions these days is the re-definition of privacy, particularly in a global setting – which has competing (and sometimes contradictory) regulatory environments.

Key takeaway

Realize that online privacy is a largely unresolved issue. Technology is clearly ahead of legislation. One of the issues generating the most controversial discussions these days is the re-definition of privacy, particularly in a global setting – which has competing (and sometimes contradictory) regulatory environments.

- **Know social media legal risks.** It can be difficult to maintain control of your message when others can respond to it, and then display it in a different context. This reality becomes even more critical in a regulated environment. The Communications Decency Act offers some protection in the US, but it is not global.
- **Be conscious of hiring issues.** Many companies use social media as a background check system for employees, either for hiring purposes, or investigations into allegations. Be upfront with applicants/employees about your intention to use social media. Someone outside of the hiring process should perform these checks. Keep in mind also that some organizations ban the use of social networks in the hiring process because they cannot control for regulatory constraints such as anti-discrimination.
- **Learn about FTC Regulation of Testimonials.** The testimonial must be clear in its representation, i.e. if compensation is provided.
- **Know the FINRA Guidance for Financial Services Companies.** FINRA requires financial services' companies to maintain comprehensive records of what they say, and what others say on their sites.
- **Realize that the law has not kept up with the pace of social network development. While anyone can publish content nowadays, laws were created with traditional publishing institutions in mind.** These laws favor the right to free speech, which puts the right to privacy (for both individuals and organizations) in an uncertain balance.
- **Understand the use of an “objective test.”** This assumes that everybody’s privacy sensitivity is the same, in that if you tell somebody something publicly, you forfeit your expectation of privacy. Keep this in mind every time you post something online: the law assumes you consent to reproduction, because you posted it publicly.
- **Establish a Complaint Mechanism.** Currently, there is a “notice and take down regime” under the Digital Millennium Copyright Act. This has established a means for individuals to contact companies if they think their copyright is being violated.



Tools

Social technology is everywhere. Not only is everyone online using it, but the frequency of its use is convincing a wide range of organizations of the powerful pull that relationships exert on individuals – and how this dynamic might be harnessed for business use.

At the heart of these technologies is a networked architecture that creates a many-to-many communications environment; what we see as an online community, in its broadest definition.

All online communities operate on a social software foundation. The toolkits of community managers, however, vary immensely based on a variety of factors:

- Size of organization
- Strategic importance of the community
- Functional use cases
- Preference of an organization's IT team (buy vs. build)
- Budget and size of social initiatives

There are a dizzying array of tools targeted at managing an organization's external presence – from the large social networks, through to white label social software, monitoring, analysis, search, mobile, geo-location and location-based technologies, social gaming, URL shorteners, idea generators, reputation analysis mechanisms, recommendation engines, and more.

A host of management applications (TweetDeck, Seesmic, HootSuite, CoTweet, etc) offer integration with many of the other tools. Consumer-influenced freemium business models further add to the complexity of the landscape, and make it hard to know which companies have the resources they need to survive. This chaos is providing market opportunity for enterprise-level solutions to simplify and centralize the use of these technologies.

For internal applications, the market for social software is a bit more consolidated and includes:

- Traditional collaboration suites like IBM's Lotus suite and Microsoft's SharePoint
- Newer players like Jive, SocialText, Acquia, Igloo Software, NewsGator, Moxie Software, and Yammer
- Niche providers for specific uses like Spigit, BrightIdea, Salesforce Chatter, InsideView, and Atlassian

For this set of solutions, it is critical for the technology to work with existing infrastructure so that it integrates with enterprise search, email, content management, ERP, intranets, and employee directories and does not become yet another silo of information.

One thing is for certain: social technologies are moving quickly, and communications tools are being disrupted by user expectations set by Facebook. Increasingly, if communications tools are not as easy to use and effective as Facebook, people will default to using the largest social network in the world – especially now that Facebook has private groups.

This trend represents a real challenge for organizations, as they balance their interest in being part of conversations (both market conversations and those among their employees), and their need to manage risk.

Community managers typically go through phases of intensity when they evaluate or deploy new technology, but on a day-to-day basis, technology is a constant but unremarkable aspect of their responsibilities. Too much focus on chasing the latest ‘shiny’ technology objects could prevent community managers from focusing on the community itself, and become a distraction – albeit one that is sometimes hard to ignore.

Social Media

- **Don’t feel that you have to use every social media tool or channel available.** If you are doing something and it works for you and your company, don’t feel that you have to abandon it in favor of the ‘latest thing’.
- **Be aware of grassroots social media efforts occurring within an organization.** This can cause problems in terms of data integration, master data management, and backend systems.
- **Invest in monitoring software.** This is the only hope your company will have of understanding how they are perceived on the social web, mitigating negative information spread about them and influencing their brand presence.
- **Know the difference between Facebook pages and ‘community’ pages.** A Facebook page has to map to an actual business, an entity, a political person, a personality or a business. Now, however, community pages allow you to create a Facebook page for any topic. Facebook did this in order to be able to grow a rich Open Graph that will help them have access to an incredible wealth of information. Beware, however, that once it reaches a certain size, Facebook can shut it down.

Key takeaway

Be aware of grassroots social media efforts occurring within an organization. This can cause problems in terms of data integration, master data management, and backend systems.

- **It is absolutely imperative that organizations search what is being said about their brand on Facebook community pages.** Ask to be an administrator of relevant community page(s), link the community page(s) to your official website, and update Wikipedia to ensure the information is correct and up to date. Also, take the time to ensure that people are becoming fans of your actual site – not just fans of the associated community pages.

- **Be aware of Facebook’s search efforts.** Facebook is making major strides into the business of search, including a concerted effort to compete with Google. Hence the rollout of the “Open Graph protocol” and the use of social plug-ins. The information being collected is further enhanced by the “Like Button”, the “Recommendations Plug-in”, the “Log in Button”, the “Friend Pile”, the “Comments Button”, and the “Activity Feed”.
- **Take advantage of targeting opportunities.** Open Graph protocol and social plug-ins will create a wealth of information useful for targeted advertising. Once this graph is populated, it is going to be the most powerful information tool anybody has ever seen in the business world.
- **Create a “Like Button” on your site.** Take the time to customize your button, as it allows an organization to name what goes into that Open Graph.

Platform Changes

- **Prepare your community.** Make sure your community is prepared for, and willing to embrace technology changes. Without communication, changes can boil into a full-blown crisis. Also, ensure that the company engages the right people to actively participate in the change – and that they have enough buy-in to help convert others. Finally, try not to overwhelm your audience with too much change all at once.
- **Explain the ‘why.’** Throughout your communication process, focus on the differences between the platform you’re leaving, versus the one you’re adopting. Emphasize that you are always looking to improve your offering, and that you are willing to listen to constructive feedback.

Key takeaway

Don’t worry about over-communicating. You simply can’t provide enough information, especially if the communication is opt-in. However, limiting communication to the reasoning behind a change, versus the details of the change, keeps the discussion on topic.

- **Be accessible and available on multiple communication channels during the transition.** Be present to receive feedback (in a public forum, via email, via a DM on Twitter, etc). Sort through the feedback, and make sure valid concerns are prioritized, and forwarded to the right people internally. Meet with the key stakeholders to ensure that future decisions hinge on the most crucial feedback.

- **Give it a test drive.** Consider publishing a “proof of concept” or establishing a test site with your developer/vendor prior to making any platform change decisions.
- **Show respect as you proceed.** Give your community a voice, and a chance to acclimatize. Changing and migrating their community can be akin to redecorating part of their home without their consent.
- **Don’t worry about over-communicating.** You simply can’t provide enough information, especially if the communication is opt-in. However, limiting communication to the reasoning behind a change, versus the details of the change, keeps the discussion on topic.

Optimizing the User Experience (UX) for Engagement

- **Remember the K.I.S.S. Principle.** It is worth revisiting functionality (and, if necessary, stripping some of it away) to simplify your user experience. This will often increase engagement – particularly for newer users.

Key takeaway

Tools and technology tend to grow more complex and complicated over time. It is worth revisiting functionality (and, if necessary, stripping some of it away) to simplify your user experience. This will often increase engagement – particularly for newer users.

- **Keep confusion to a minimum.** Removing choices that might stop users in their tracks because they don’t know the answer (i.e. what group/location should I post to?) will increase engagement.
- **Help your users find relevant content.** Categorizing your content in multiple ways through automated semantic tools or tagging is critical to maximizing its value. If you require users to categorize something they’ve posted, ask them to do so after they post their content – otherwise this extra step is likely to create a roadblock.
- **Create a taxonomy that makes sense to the community member, and is aligned with organizational priorities.** This step takes a great deal of time, but makes your content eminently more usable – and therefore, more valuable. In addition, use the same taxonomy for all content to avoid confusion. This is critical to engagement.

- **Keep tracking tools front and center.** A dashboard that helps the community manager track engagement metrics is very useful for keeping tasks focused and aligned with priorities.
- **Be aware of UI Internationalization needs.** This is primarily problem for international corporations who want to have communities in more than one language.

Key takeaway

Help your users find relevant content. Categorizing your content in multiple ways through automated semantic tools or tagging is critical to maximizing its value.

Internal Collaboration

- **Keep numbers healthy to keep streams active.** Enterprise micro-blogging and activity streams work best when there is a large group using the tool vs. a small group. It also helps keep the content focused and business-related.
- **Make the investment to adopt the tools most appropriate for achieving desired goals. If you're working on a one-time event, your time and effort investment will be much lower.** If attention and participation is critical vs. simple information distribution, then the tools and the methods will become more important.
- **Consider visual tools as an alternative to traditional collaboration tools.** These tools can help give a visual representation to a voice, provide a visual backup for text or spoken instructions, help people get to know each other and gain a sense of trust much more quickly, and engage consumers to assist with product packaging.

Vendor Evaluation

- **Find the vendor with the right fit for your organization.** It may not necessarily be the market leader. Vendor intangibles are things like maintenance and support, etc. Accordingly, an organization should understand the vendor's strategy and roadmap and then liability and stability. Spend time researching the administration and system services for the vendor. Unfortunately, this is often overlooked. It is very important to understand the key workflows needed to support the business goal and then align the software choices around those workflows first.
- **Are they walking the walk?** Check to see if your social software vendor has a vibrant and successful community.

- **Be willing to haggle.** Pricing models in the social software space vary, but most vendors are willing to negotiate based on the needs of the organization. Many pricing models are variable – but this can be problematic for organizations if they have little room for variability in their budget.
- **To cloud or not to cloud?** When considering whether to go with a hosted platform or an in-house option, consider the issues of integration, managing entitlements, and data integration with CRM. The other concern with hosted platforms, specifically SaaS, is customization limitations. If your vision drifts towards the outer limits of what a tool can do, you may hit road blocks before long. Internal hosting, although costly and time consuming is more likely to get you where you want to go.
- **Make the right call about proprietary software.** When considering whether to develop a community from scratch or use an off-the-shelf product, consider whether or not you really want to be in the software business (i.e. the customization that will be needed). If the community is central to what the organization is doing, there may be good reason for wanting to build it internally, and ultimately own the application. If the community is in a supporting role, then it is advisable to start with a packaged solution, and customize it.
- **Stay up-to-date.** For marketing/support community implementations, do due diligence to ensure your vendor is keeping pace with all the (frequent!) API changes for Twitter and Facebook.
- **Consider if open source is the right fit.** Choosing the right open source software can be challenging, primarily due to the reality of a large and difficult to navigate app environment. The overlap of functionality and the sheer number of options available can make solid choices a real challenge. However, open source is a great place to start if you need a highly customized solution.



Metrics and Measurement

The measurement of social initiatives has been a hot topic over the past year and for good reason: we all need to understand why we are undertaking social approaches, and what results we're seeing when we do. Success depends on that understanding.

There are a number of issues making this discussion so heated:

- Anything we do as an organization should have justification – otherwise, why do it?
- The tepid economy is putting pressure on executives to show direct, measurable results.
- Social processes and cultural changes occur differently than other types of process change because of the network effect: output is slow at first, but picks up dramatically over time.
- Social initiatives, when successful, accrue benefits to multiple functional groups within an organization – but budgets and investments are usually still siloed. This results in a couple of issues: any group investing in social initiatives bears the full costs without receiving the total benefit – and when success does occur and multiple stakeholders see benefits, the original goal can become murky.

Business owners of social initiatives must maintain focus on their primary objectives while continually setting expectations about how and when the results will accrue. This is one of the biggest responsibilities social leaders and community managers face.

Communities are a fundamentally new operational dynamic for most companies so – perhaps counter-intuitively – training and education are imperative to developing appropriate metrics and scorecards.

Different Audiences, Different Metrics

- **Don't think about metrics as a single set.** Different metrics serve the needs of different audiences. Executives need a very different scorecard than the community management team. Typically there are three types of scorecards: the strategic, the operational, and one with daily task-based reporting.

Key takeaway

Don't think about metrics as a single set. Different metrics serve the needs of different audiences. Executives need a very different scorecard than the community management team. Typically there are three types of scorecards: the strategic, the operational, and one with daily task-based reporting.

- **Size has an impact on expectations.** There is a big difference between large organizations and small organizations when it comes to short-term financial ROI: Understand sensitivities and expectations before building ROI models and estimates.
- **Beware 'databrain.'** Executives have become numb to copious amounts of data. What actually provides meaning and drives change is the ability to share a story. Using metrics to support a story maximizes the impact of data.

Key takeaway

Beware 'databrain.' Executives have become numb to copious amounts of data. What actually provides meaning and drives change is the ability to share a story. Using metrics to support a story maximizes the impact of data.

Measurement Techniques

- **Be conscious of different marketing perspectives.** Those involved exclusively in the online marketing space tend to be very focused on the acquisition of customers, and associated hard metrics. Those in broader marketing roles are more familiar with the value of ‘softer’ metrics. To help each side understand the significance of the other side, talk about social media values in terms of three buckets: hard metrics, additional business value, and branding value. Add up the value amounts for each of these buckets in order to arrive at a ‘dollar’ amount for estimating monetary value.
- **Create a points system to clarify value.** One approach to demonstrating the value of complex behavior is to assign different values to different actions (for instance, the value of different website visitor actions). Show the executive team different layers of metrics, and assign point values to different behaviors. These can be used to support the company’s goals for any given program.
- **Don’t over hype.** When it comes to estimating ROI, make conservative assumptions.
- **Remember that all members of your network are not the same.** They actually behave and influence quite differently. With that in mind, treating and measuring segments differently can help you reach business outcomes more efficiently. This strategy directly impacts ROI by reducing inefficiencies.
- **Break down the benefits.** For phone support-oriented organizations looking to prove the value of social support, establish an ROI metric that demonstrates the increased costs associated with a phone call versus self-serve answers in a community forum.

The Catch 22 of Community ROI

- **Community investments and results are offset.** If you don’t consistently offer sufficient value for members over time, you may never get to a successful community that generates results. However, once a successful community is established, a variety of new business model opportunities open up. Understand that the ROI curve is geometric – but that it often begins with a downward drop, and grows slowly for the first little while.
- **Community ROI does not happen overnight.** The ROI of community activity can take a while; there’s very little that’s quick about changing behaviors. Tracking on a daily or weekly basis can end up painting the wrong picture, and become a waste of time. Consider your goals: if they are simple, tracking on a weekly basis may be appropriate... but if they are complex, monthly tracking is a smarter choice.

- **Remember the ‘billboard’ example.** When someone asks you to prove the ROI for social media marketing, ask about the ROI for, say, billboards. There are ways to measure conversion, certainly – but a big part of the value lies in brand awareness.
- **Associate statistics with an ROI metric.** This will come down to proving the value of what a post means versus what a comment means – and how engagement is needed to keep these values moving upward.

Key takeaway

Community investments and results are offset. If you don't consistently offer sufficient value for members over time, you may never get to a successful community that generates results.

Summary

In 2010, we saw a tremendous increase in the valuation of the community management discipline and understanding of its critical role in social business initiatives.

However, as an organization with members at the forefront of this field, we are witnessing an ongoing conflict between the complexity of the discipline, and the simplistic view many organizations have of it.

Three things make community management critical:

- Organizations cannot control how well or how often people communicate
- Networked communications environments are opt-in
- The speed at which information can be shared (both good and bad) has changed by orders of magnitude

Community management is there to understand what information is being shared and by whom, to promote perspectives, individuals, and information aligned with organizational goals, and to diffuse issues before they cause a crisis.

While this may sound relatively simple in a sentence-long description, the reality is it's incredibly complex. Community management requires a multi-faceted understanding of how people interact, of the community management discipline itself, business theory, and finally, of their organization. Add to this the reality that community managers need contextual judgment that takes time and experience to learn.

We hope that this report helps you to:

- Understand the complexity of the community management discipline
- Plan for and support your community management team
- Better manage your community
- Find inspiration for new approaches

Appendix: Resources

Strategy

Experts

1. [John Hagel](#)
2. [Francois Gossieaux](#)
3. [David Alston](#)

Further Reading & Resources

- [The Power of Pull: How Small Moves, Smartly Made, Can Set Big Things in Motion](#)
- [Groundswell: Winning in a World Transformed by Social Technologies](#)
- [The New Capitalist Manifesto: Building a Disruptively Better Business](#)
- [The Wisdom of Crowds: Why the Many Are Smarter Than the Few and How Collective Wisdom Shapes Business, Economies, Societies and Nations](#)
- [McKinsey Quarterly: The rise of the networked enterprise: Web 2.0 finds its payday](#)
- [Altimeter Group research: How Corporations Should Prioritize Social Business Budgets](#)

Leadership

Experts

1. [Charlene Li](#)
2. [Jamie Punishill](#)
3. [Dabra Askanase](#)

Further Reading & Resources

- [Open Leadership: How Social Technology Can Transform the Way You Lead](#)
- [Mavericks at Work: Why the Most Original Minds in Business Win](#)
- [Empowered](#)
- [\[Video\] Social Media Is Not a Fad](#)
- [Altimeter Group report: Career Path of the Social Strategist](#)
- [Solitude and Leadership](#)

Culture

Experts

1. [Marcia Conner](#)
2. [Beth Kanter](#)
3. [Chris Bailey](#)

Further Reading & Resources

- [\[Video\] Drive: The Surprising Truth About What Motivates Us](#) and the [book](#).
- [The New Social Learning: A Guide to Transforming Organizations through Social Media](#)
- [\[Video\] Benjamin Zander on music and passion](#)
- Visual storytelling professionals: [Nancy White](#) and [XPLANE](#)
- [\[Podcast\] Podcast: 10 Infrastructure Requirements For The Creative Economy](#)
- [Stop Blaming Your Culture](#)
- [Why Zappos Pays New Employees to Quit—And You Should Too](#)

Community Management

Experts

1. [Nancy White](#)
2. [Valeria Maltoni](#)
3. [Andrea Weckerle](#)
4. [Adam Garone](#)
5. [Robyn Tippins](#)

Further Reading & Resources

- The Community Roundtable's [Resources for Community Managers](#)
- [The Art of Community](#)
- [18 Rules of Community Engagement](#)
- [Social Networking for Business](#)
- [Community Management Cookbook](#)

Conferences & Events

- [Social Media & Community 2.0 Strategies Conference](#) – April, Boston, MA
- [Enterprise 2.0](#) – June, Boston, MA
- [Community Leadership Summit](#) – July, Portland, OR
- [Enterprise 2.0](#) – November, Santa Clara, CA

Content & Programming

Experts

1. [Margot Bloomstein](#)
2. [Liz Stauss](#)
3. [John Wall](#)
4. [Leslie Poston](#)
5. [Natanya Anderson](#)

Further Reading & Resources

- [Content Strategy for the Web](#)
- [Content Rules](#)
- Steve Garfield's [Online Video Resources](#)
- [Creating a Content-Driven Community](#)
- [The Influence Pyramid](#)

Policies & Governance

Experts

1. [Lauren Gelman](#)
2. [Mari-Anne Snow](#)

Further Reading & Resources

- Wall Street Journal's [What They Know](#)
- [Electronic Frontier Foundation](#)
- [Privacy, Free Speech, and 'Blurry-Edged' Social Networks](#)
- [Social Media Governance database & Social Media Strategies for Business - Social Media Governance](#)
- [Best practices of social business governance](#)

Tools

Experts

1. [Tony Byrne](#)
2. [Mary Wardley](#)
3. [Cappy Popp](#)
4. [Leslie Poston](#)

Further Reading & Resources

- [OneForty.com](#)
- [Presentation] [Facebook OpenGraph](#)
- [Sponsored report] [The Forrester Wave™: Community Platforms, Q4 2010 report](#)
- [List of Social Media Management Systems](#)
- [Wiki] [Social Media Monitoring Solutions](#)
- [Enterprise 2.0](#)
- [Systems Dynamics overview](#)
- [Social Network Analysis Case Studies](#)

Metrics & Measurement

Experts

1. [KD Paine](#)
2. [Amber Naslund](#)

Further Reading & Resources

- [Annual Metrics for the SAP SDN Community](#)
- Lithium's [Community Health Index](#)
- [Social Media Metrics: How to Measure and Optimize Your Marketing Investment](#)
- [Measure What Matters: Online Tools For Understanding Customers, Social Media, Engagement, and Key Relationships](#)
- [Presentation] [Listen and Learn: New Media, New Metrics](#)